

Potential Economic and Fiscal Benefits of a Proposed Arts & Culture District in Pine Bluff, Arkansas

October 2022

Final Report

Report submitted to:

Pine Bluff Advertising and Promotion Commission

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1 Introduction



Introduction

The Pine Bluff/Jefferson County National Heritage Trails Task Force, Pine Bluff Advertising and Promotion Commission, and Delta Rhythm & Bayous Alliance is proposing a new cultural district which would include various landmarks related to topics such as civil rights and the blues. While downtown Pine Bluff has experienced considerable economic woes in the wake of manufacturing plant closures, the proposed cultural district represents a unique opportunity to create a new cultural heritage tourism hub that could potentially attract new visitors to the area (including a portion of current patrons at Saracen Casino) in a similar fashion to how other municipalities throughout the US have capitalized on heritage tourism.

Based on current project specifications, the proposed district has a number of components that would make the district a unique destination, including the largest blues memorial in the Delta, a Chitlin' Circuit park, and one of the few remaining African American-owned vaudeville theaters, which would become a museum and also partially be used by the University of Arkansas Pine Bluff.

Tourism Economics, a subsidiary of Oxford Economics, analyzed current market conditions to estimate potential visitation at the proposed cultural district, as well as the potential economic and fiscal (tax) benefits attributable to new visitation and tourism.

2 Key Findings



PINE BLUFF CULTURAL DISTRICT

POTENTIAL ECONOMIC IMPACTS IN JEFFERSON COUNTY

POTENTIAL DIRECT IMPACTS

The proposed Pine Bluff cultural district would generate significant economic impacts as it attracts visitors to the region. In addition to spending money during their visit to the cultural district, visitors would also spend money at businesses and establishments throughout the local economy during their stay in Jefferson County, including local restaurants, retailers, and recreation/entertainment venues.

Tourism Economics estimates the proposed cultural district could attract 128,000 total visits, including visits by patrons who already frequent Saracen Casino. These 128,000 visits would include nearly 88,000 non-local visits, resulting in \$13.6 million in total spending.



\$13.6 MILLION

Potential Visitor Spending by Non-Local Visitors to Proposed Pine Bluff Cultural District



128,000

Total Potential Visits to Proposed Pine Bluff Cultural District

POTENTIAL ANNUAL ECONOMIC IMPACTS OF VISITOR SPENDING

The \$13.6 million in spending by non-local visitors to the proposed cultural district would generate a total economic impact of \$18.2 million in Jefferson County. This total potential countywide economic impact of \$18.2 million would support nearly 250 annualized part-time and full-time jobs and would generate \$1.9 million in state and local taxes on an annual basis.



\$18.2 MILLION

Total Potential Economic Impact of Spending by Non-Local Visitors to Proposed Pine Bluff Cultural District

SUMMARY POTENTIAL ANNUAL ECONOMIC IMPACTS OF VISITOR SPENDING



\$13.6M

Annual Non-local Visitor Spending



\$18.2M

Total Annual Economic Impact



250

Total Annualized Jobs Generated



\$1.9M

Total Annual State & Local Tax Revenues

3 Pine Bluff Market Demographics

The background of the slide is a dark, blue-tinted photograph of an airport terminal. The most prominent feature is the large, curved, grid-patterned ceiling that spans the width of the frame. Below the ceiling, a walkway with a metal fence runs across the middle ground. In the distance, there are some structural elements and what appears to be a check-in counter or information desk. The overall atmosphere is quiet and somewhat somber due to the low light and monochromatic color scheme.

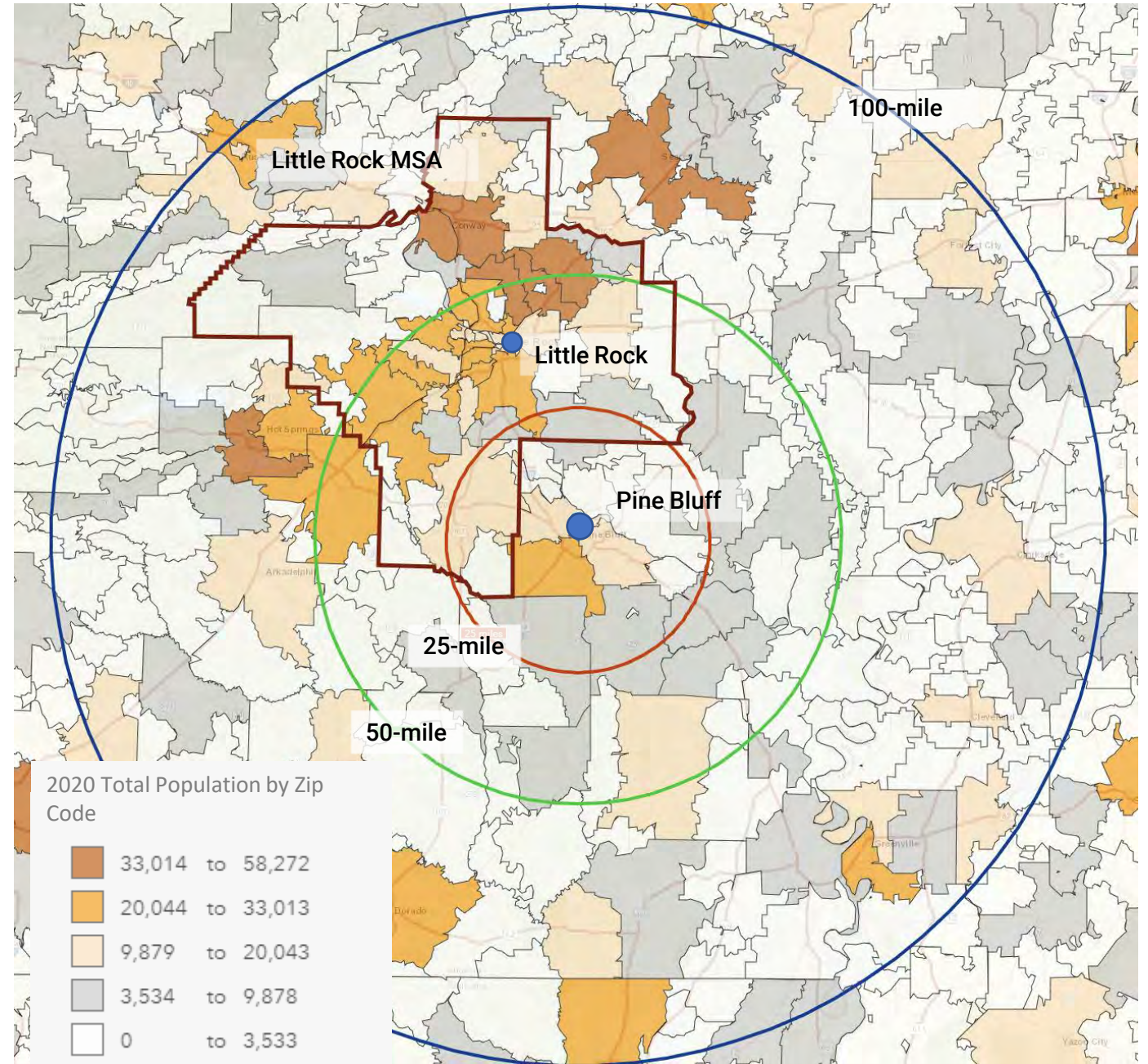
Pine Bluff

Population

The area immediately surrounding Pine Bluff has a relatively low population base, with just 93,000 people living within 25 miles from Pine Bluff.

However, as a significant portion of the Little Rock-North Little Rock-Conway, AR Metropolitan Statistical Area (MSA) is within 50 miles from Pine Bluff, the population base living with 50 miles from Pine Bluff jumps significantly to more than 715,000 people.

The entire Little Rock-North Little Rock-Conway, AR MSA is within 100 miles from Pine Bluff, and more than 1.6 million people live within 100 miles from Pine Bluff.



Pine Bluff Market Data	25 miles	50 miles	100 miles
Total Population	93,077	715,066	1,645,604

Source: US Census Bureau, ESRI

Pine Bluff

Household Income

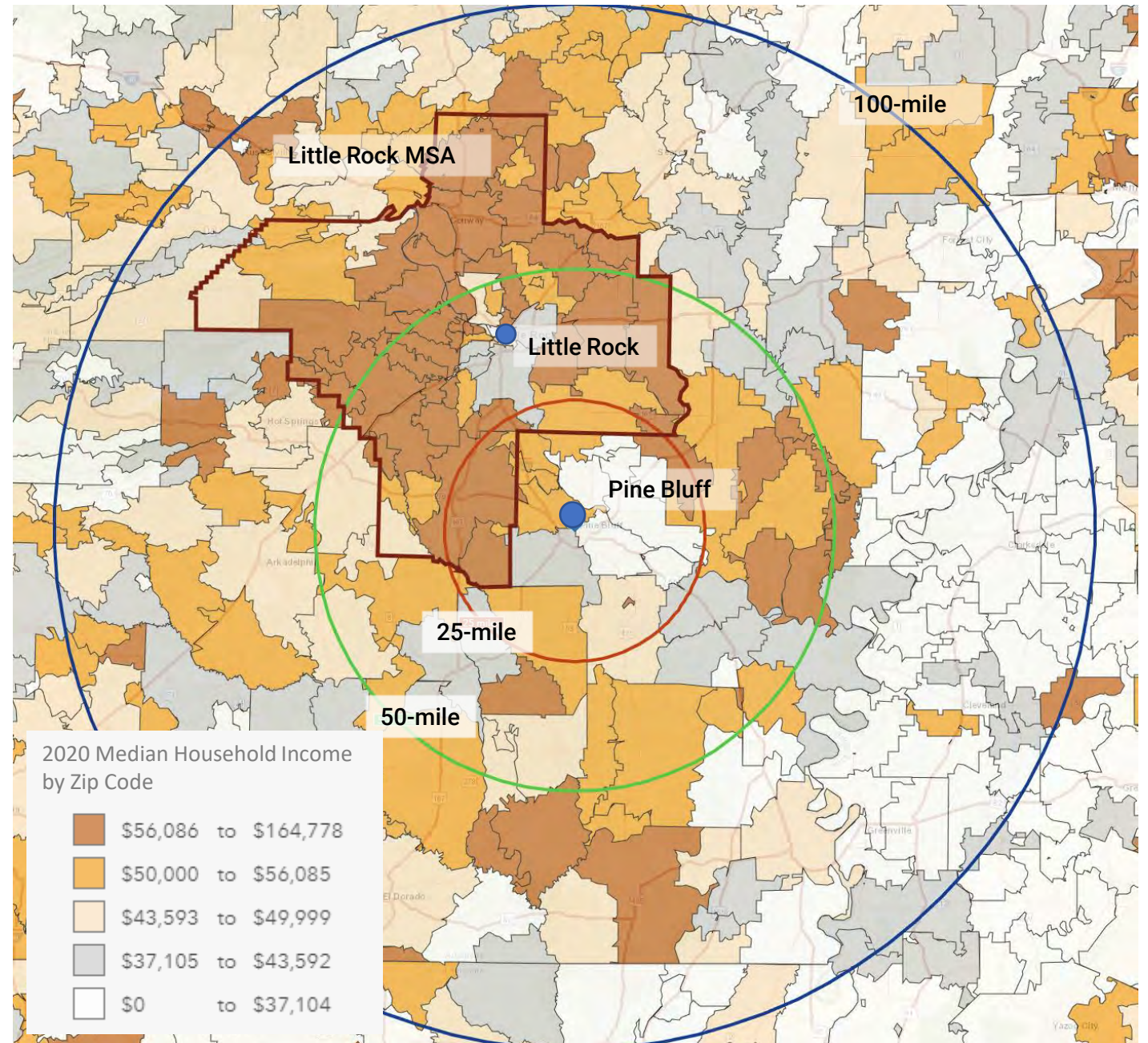
The area immediately surrounding Pine Bluff has relatively low income levels, with a median household income slightly over \$45,000 within 25 miles of Pine Bluff.

The 50-mile buffer surrounding Pine Bluff includes higher income zip codes within the Little Rock-North Little Rock-Conway, AR MSA and has a higher median household income exceeding \$55,000.

The 100-mile buffer surrounding Pine Bluff encompasses the entire Little Rock MSA, which includes additional higher income zip codes. However, the boundary also includes lower income levels to the east and has an overall median income of \$51,000.

Pine Bluff Market Data	25 miles	50 miles	100 miles
Median Household Income	\$45,164	\$55,005	\$51,482

Source: US Census Bureau, ESRI



Pine Bluff

Per Capita Income

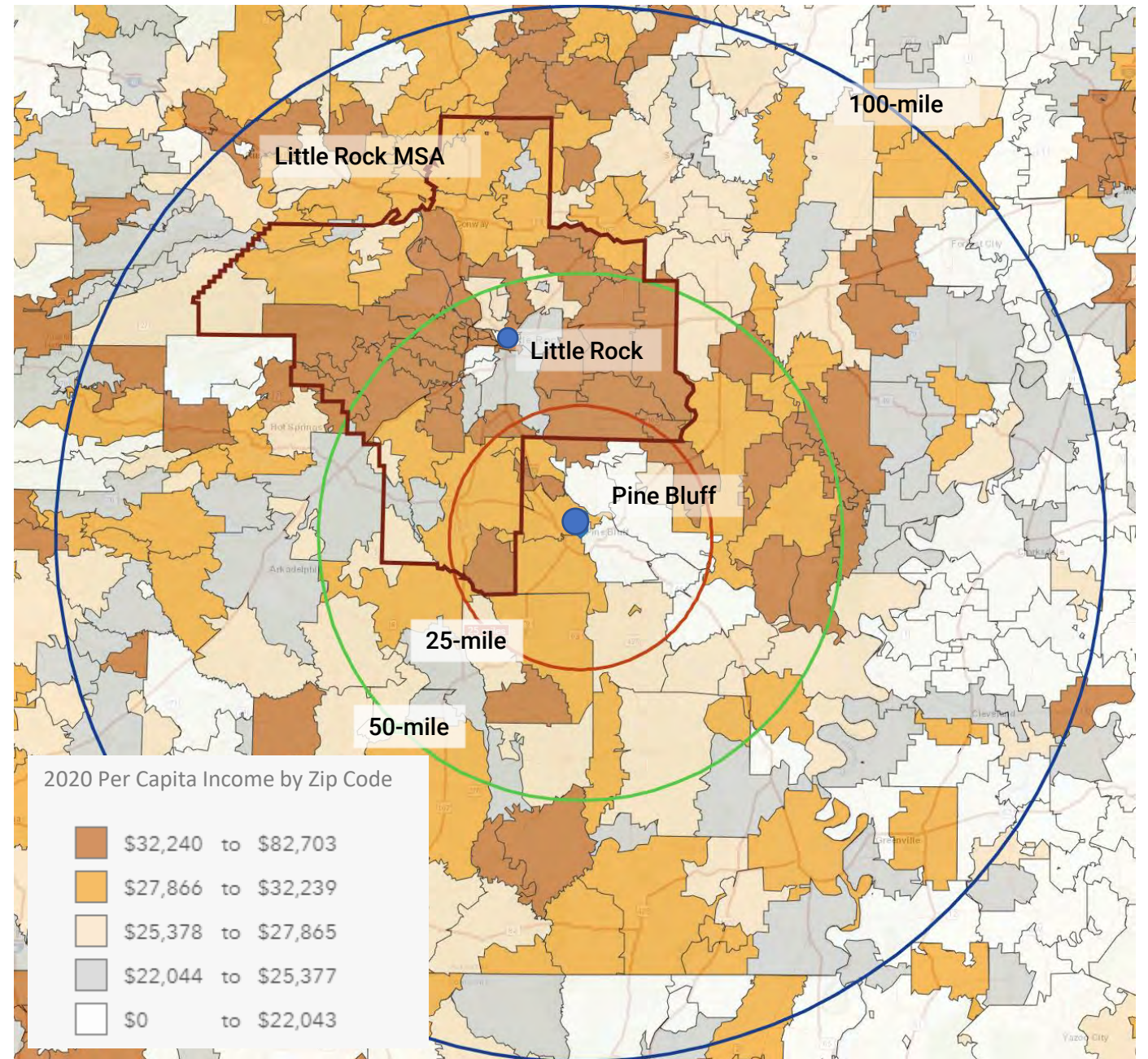
The area immediately surrounding Pine Bluff has relatively low average income levels, with an overall per capita income of nearly \$27,000 within 25 miles of Pine Bluff.

The 50-mile buffer surrounding Pine Bluff includes zip codes with higher average income levels within the Little Rock-North Little Rock-Conway, AR MSA and has a higher median household income of nearly \$33,000.

The 100-mile buffer surrounding Pine Bluff encompasses the entire Little Rock MSA, which includes additional higher income zip codes. However, the boundary also includes lower income levels to the east and has an overall median income of approximately \$30,000.

Pine Bluff Market Data	25 miles	50 miles	100 miles
Per Capita Income	\$26,665	\$32,912	\$29,957

Source: US Census Bureau, ESRI



Pine Bluff

Race

The majority of the population in Pine Bluff (76%) and Jefferson County (56%) is African American. Approximately 49% of the population within 25 miles of Pine Bluff is non-White.

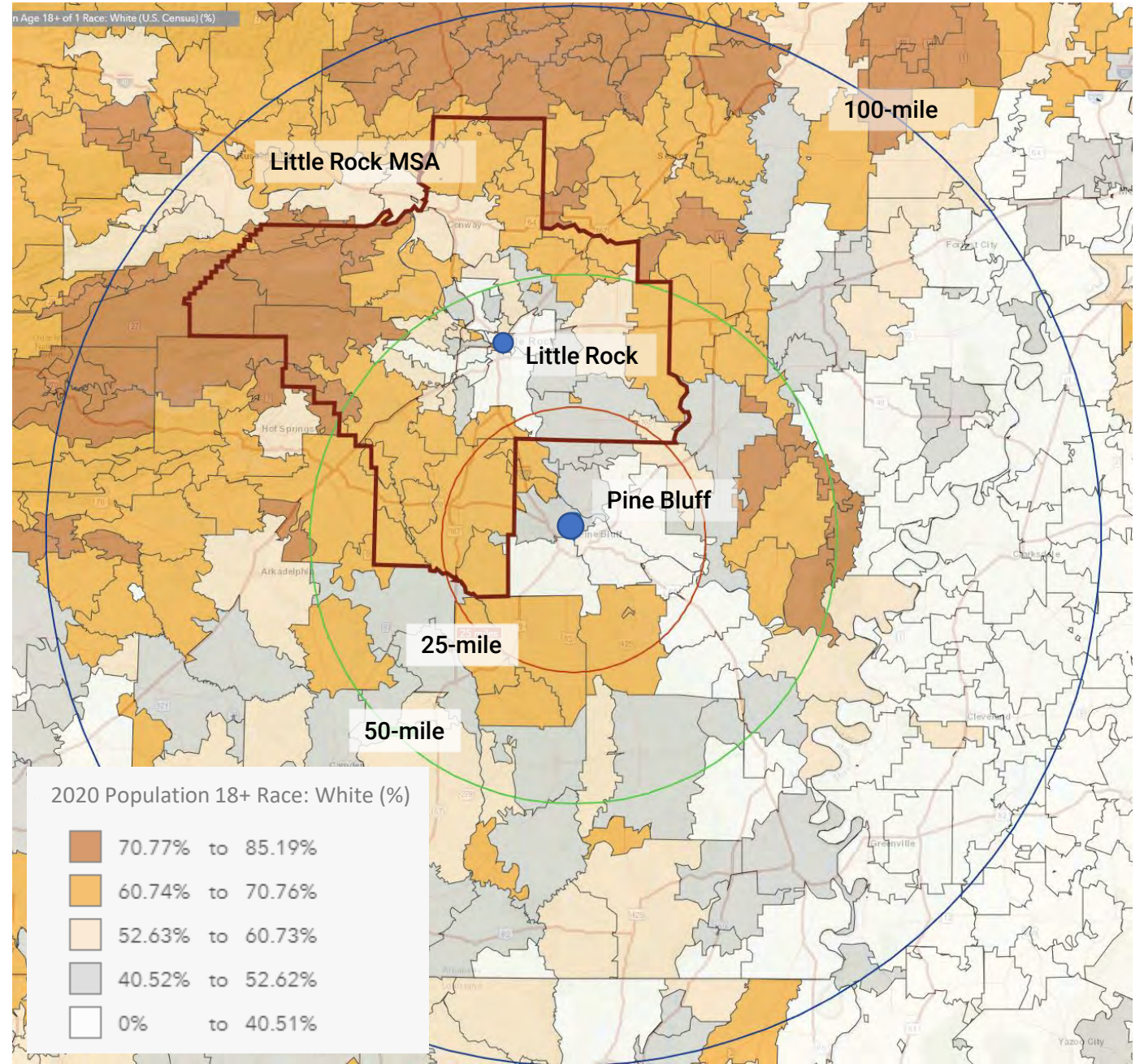
Overall, 51% of the population within 50 miles of Pine Bluff is White, and 49% of the population is non-White.

Zip codes further away from Pine Bluff start to have higher percentages of White population. Overall, approximately 57% of the population within 50 miles of Pine Bluff is White, and 43% of the population is non-White.

The 100-mile buffer surrounding Pine Bluff has a significantly higher number of zip codes with higher percentages of White population. Overall, 62% of the total population within 100 miles of Pine Bluff is White.

Pine Bluff Market Data	25 miles	50 miles	100 miles
Percentage Population White	51%	57%	62%
Percentage Population Non-White	49%	43%	38%

Source: US Census Bureau, ESRI



4

Pine Bluff Household & Consumer Spending

Household Spending

The proposed cultural district in Pine Bluff will generate significant spending across a variety of industries. The number of visitors that will find the proposed cultural district an attractive destination, as well as the amount of money these visitors will potentially spend, will be driven by current household spending levels and consumer preferences.

The research team compiled a list of activities and spending categories that are in line with the proposed district's arts, culture, and entertainment offerings that would draw visitors and tourists to Pine Bluff. For each identified activity, the analysis presents data points on:

- Total spending on the selected activity in the region (e.g., 25-mile, 50-mile, and 100-mile buffers from Pine Bluff) within the past 12 months;
- Average spent per household on the selected activity within the past 12 months; and
- Spending Potential Index (SPI), which is household-based and represents the amount spent per household for a product or service within the past 12 months relative to a national average of 100.

Household Spending

Household Spending on Entertainment and Recreation

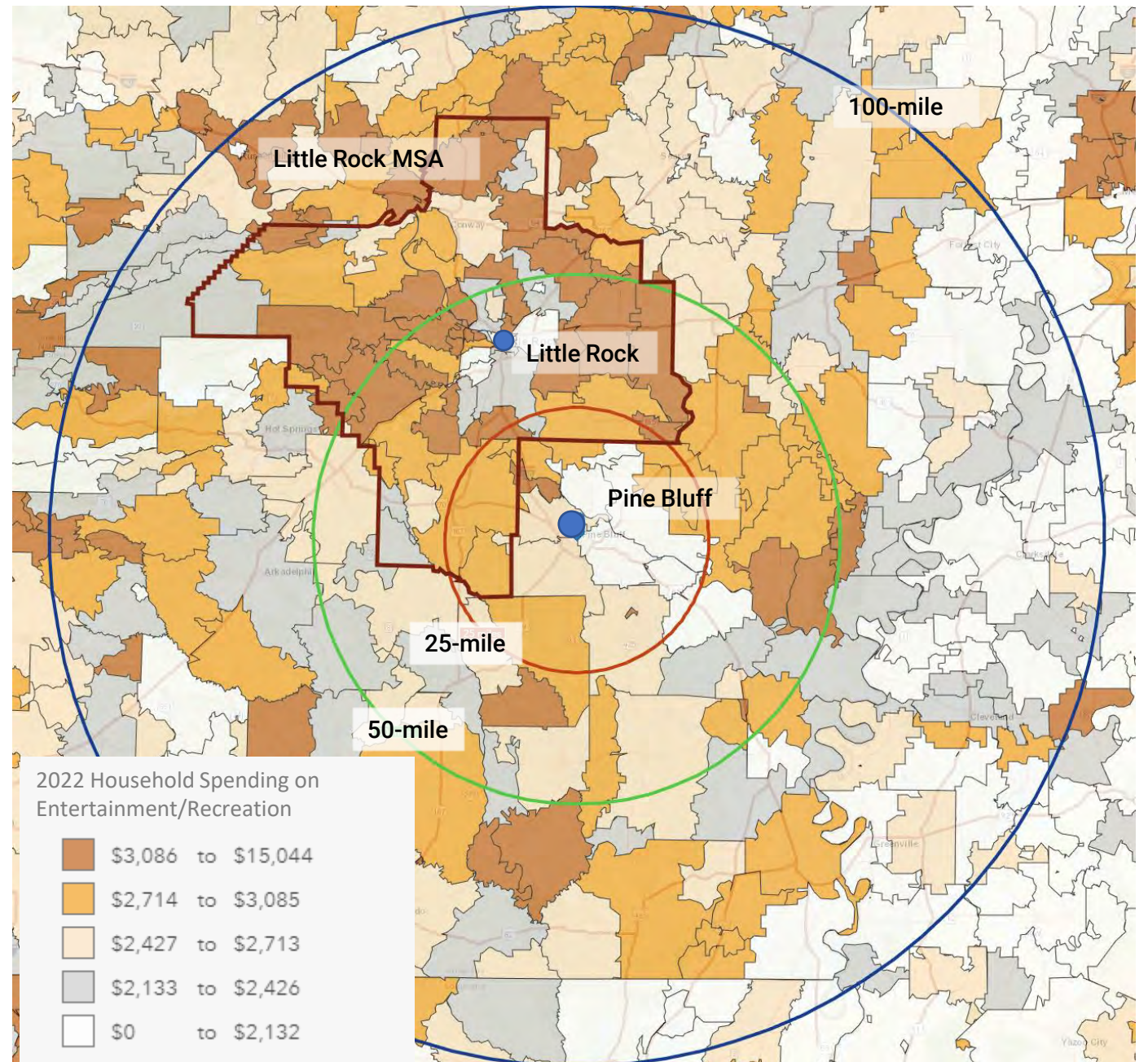
The proposed cultural district in Pine Bluff will generate significant spending across a variety of industries, including entertainment and recreation. On average, households within 25 miles of Pine Bluff spent a relatively low amount on entertainment and recreation purchases, with an average of \$2,499 per household. As previously outlined, the 50-mile buffer area had a higher percentage of higher-income households, and these households averaged \$2,879 in entertainment and recreation purchases. Households within the 100-mile buffer averaged \$2,712.

While all three trade areas (25-mile, 50-mile, and 100-mile) had entertainment and recreation SPI's lower than the national average of 100, the 50-mile trade area had the highest SPI at 78.

Pine Bluff Market Data	25 miles	50 miles	100 miles
Entertainment & Recreation: Total Spent	\$91,979,828	\$845,532,937	\$1,805,770,378
Entertainment & Recreation: Average Spent per Household	\$2,499	\$2,879	\$2,712
Entertainment & Recreation: Spending Potential Index	68	78	74

Sources: Bureau of Labor Statistics, ESRI, Consumer Expenditure Surveys

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100.



Household Spending

Household Spending on Tickets to Theatre and Concerts

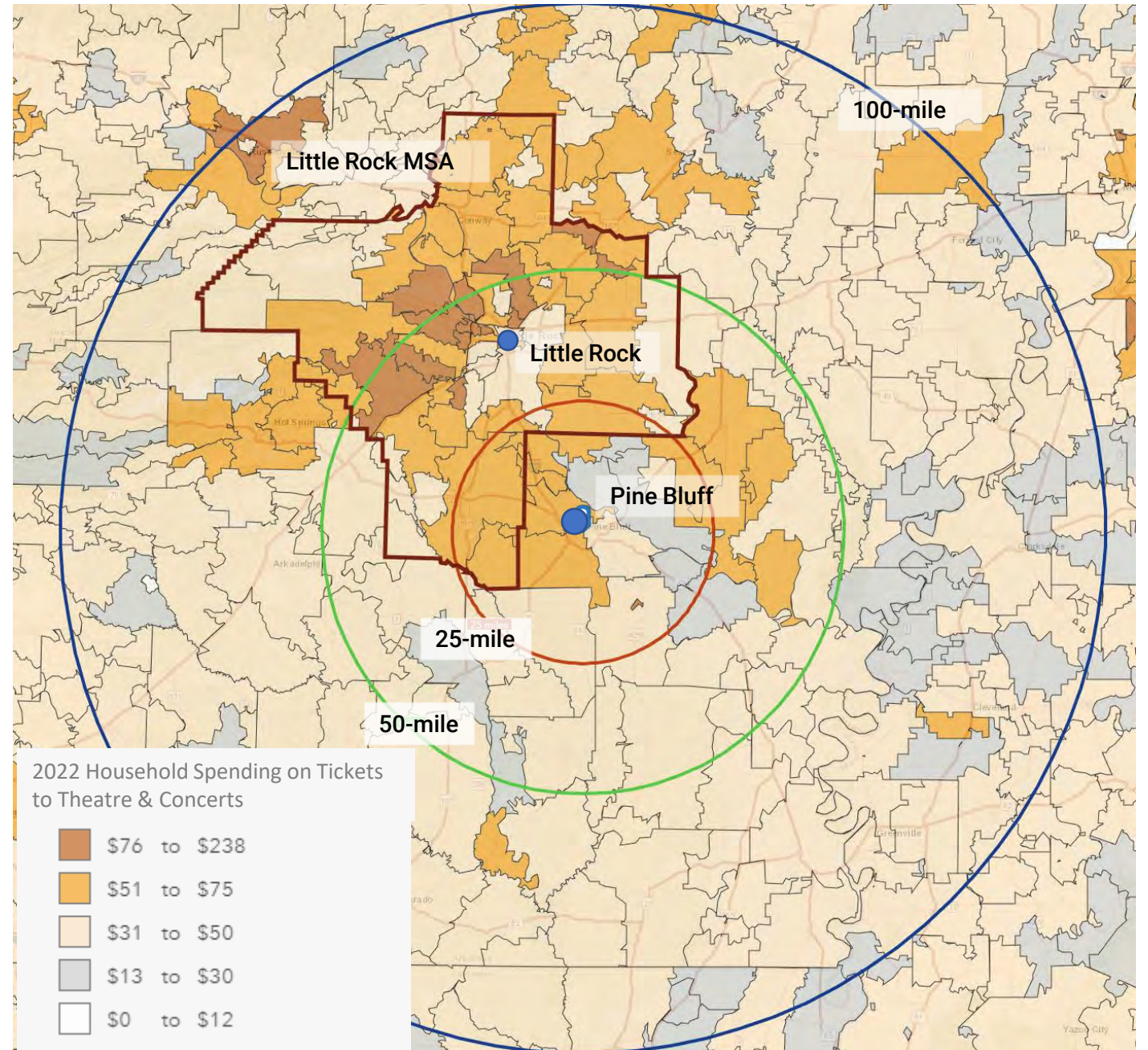
Similar to entertainment and recreation purchases, households within 25 miles of Pine Bluff spent a relatively low amount on tickets to theatre and concerts, with an average of \$51 per household. As previously outlined, the 50-mile buffer area had a higher percentage of higher-income households, and these households averaged \$64 in theatre and concert purchases. Households within the 100-mile buffer averaged \$56.

While all three trade areas (25-mile, 50-mile, and 100-mile) had entertainment and recreation SPI's lower than the national average of 100, the 50-mile trade area had the highest SPI at 70.

Pine Bluff Market Data	25 miles	50 miles	100 miles
Tix to Theatre/Opera/Concerts: Total Spent	\$1,858,846	\$18,895,501	\$37,567,454
Tix to Theatre/Opera/Concerts: Average Spent per Household	\$51	\$64	\$56
Tix to Theatre/Opera/Concerts: Spending Potential Index	55	70	61

Sources: Bureau of Labor Statistics, ESRI, Consumer Expenditure Surveys

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100.



Household Spending

Household Spending on Tickets to Parks or Museums

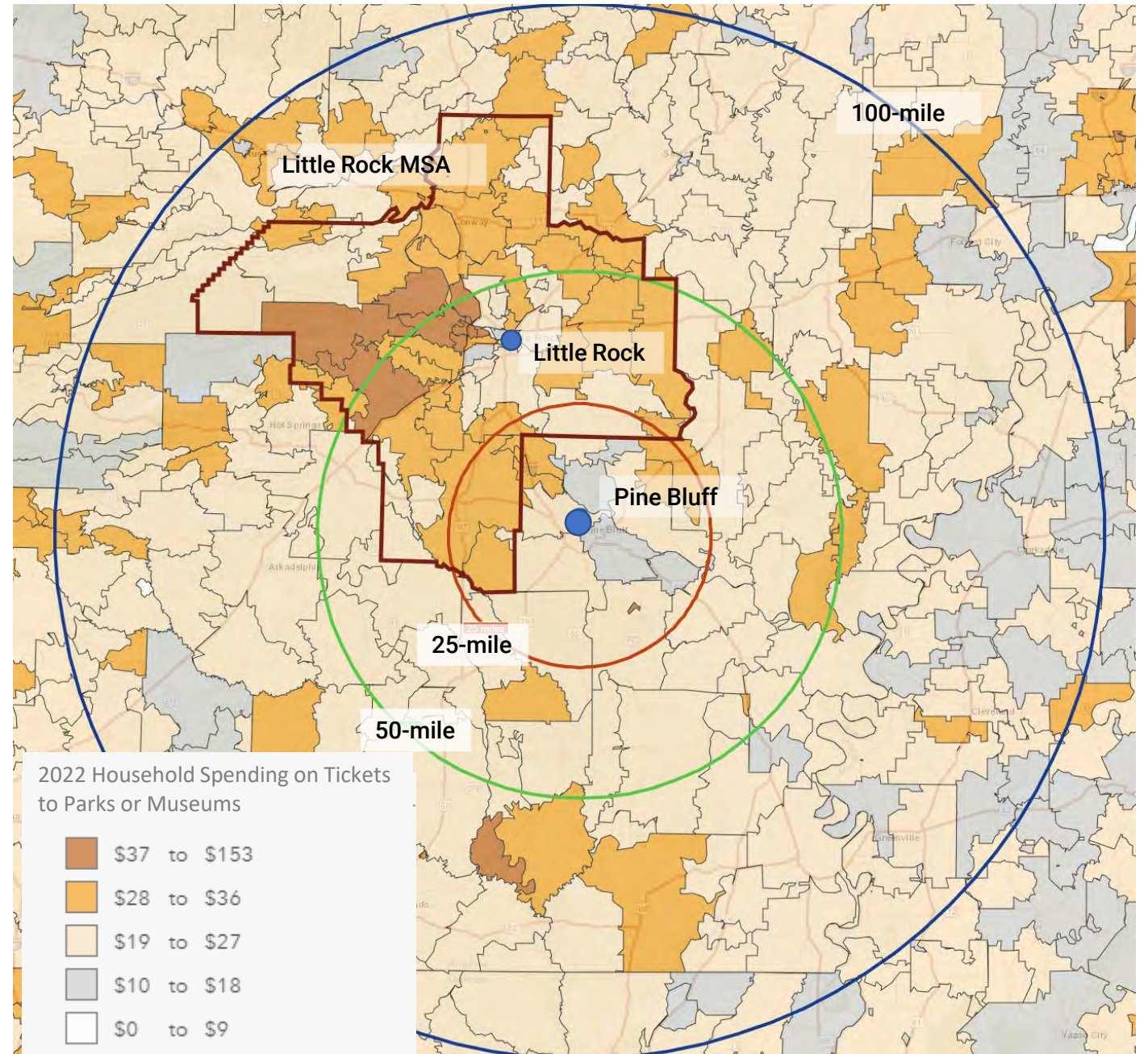
Similar to entertainment/recreation purchases and spending on tickets to theatre and concerts, households within 25 miles of Pine Bluff spent a relatively low amount on tickets to parks/museums, with an average of \$24 per household. The 50-mile buffer area had a higher percentage of higher-income households, and these households averaged \$29 in purchases of tickets to parks/museums. Households within the 100-mile buffer averaged \$27.

While all three trade areas (25-mile, 50-mile, and 100-mile) had SPI's lower than the national average of 100 for spending on tickets to parks/museums, the 50-mile trade area had the highest SPI at 75.

Pine Bluff Market Data	25 miles	50 miles	100 miles
Tickets to Parks/Museums: Total Spent	\$877,196	\$8,465,993	\$17,758,073
Tickets to Parks/Museums: Average Spent per Household	\$24	\$29	\$27
Tickets to Parks/Museums: Spending Potential Index	62	75	69

Sources: Bureau of Labor Statistics, ESRI, Consumer Expenditure Surveys

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100.



Consumer Leisure & Recreation Market

Similar to the analysis of current household spending levels on specific arts, entertainment, and recreation activities, the research team compiled a list of activities and spending categories that are in line with the proposed district's arts, culture, and entertainment offerings that would attract visitors and tourists to Pine Bluff. For each identified activity, the analysis presents data points on:

- The total number of people in the trade area (e.g., 25-mile, 50-mile, and 100-mile buffers from Pine Bluff) that participated in the selected activity within the past 12 months;
- Percent of population within the trade area that participated in the selected activity within the past 12 months; and
- Market Potential Index (MPI), which measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average. These data are based upon national propensities to use various products and services, applied to local demographic composition.

Consumer Leisure Market

Visits to Museums

The area immediately surrounding Pine Bluff has a relatively low population base, and just 8.1% of adults (6,000) within 25 miles of Pine Bluff went to a museum in the past 12 months, representing a low market potential index (MPI) of 65.

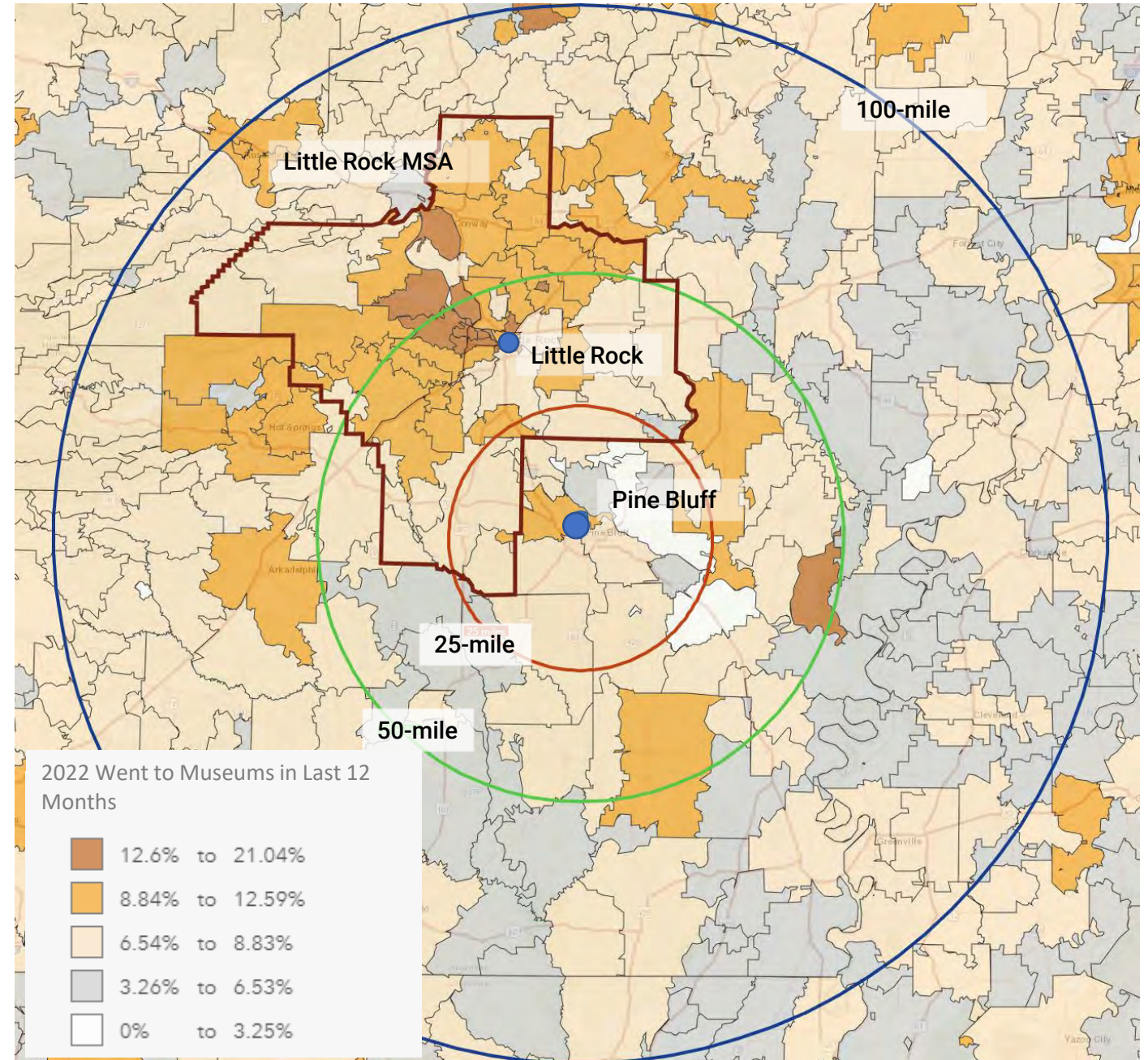
The 50-mile boundary from Pine Bluff includes zip codes with higher percentages of adults who went to a museum in the past year. Overall, 10.5% of adults (59,000) within 50 miles of Pine Bluff visited a museum recently, representing an MPI of 83.

More than 124,000 adults (representing 9.6% of total population) within 100 miles of Pine Bluff visited a museum in the past year, resulting in an MPI of 76.

Pine Bluff Market Data	25 miles	50 miles	100 miles
Went to Museum - Number of Adults	6,039	58,748	124,390
Went to Museum - Percent of Population	8.1%	10.5%	9.6%
Went to Museum - Market Potential Index	65	83	76

Sources: ESRI, MRI-Simmons, Tourism Economics

Data Note: The Market Potential Index (MPI) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average. These data are based upon national propensities to use various products and services, applied to local demographic composition



Consumer Leisure Market

Visits to Art Galleries

The area immediately surrounding Pine Bluff has a relatively low population base, and just 3.8% of adults (2,800) within 25 miles of Pine Bluff went to an art gallery in the past 12 months, representing a low market potential index (MPI) of 56.

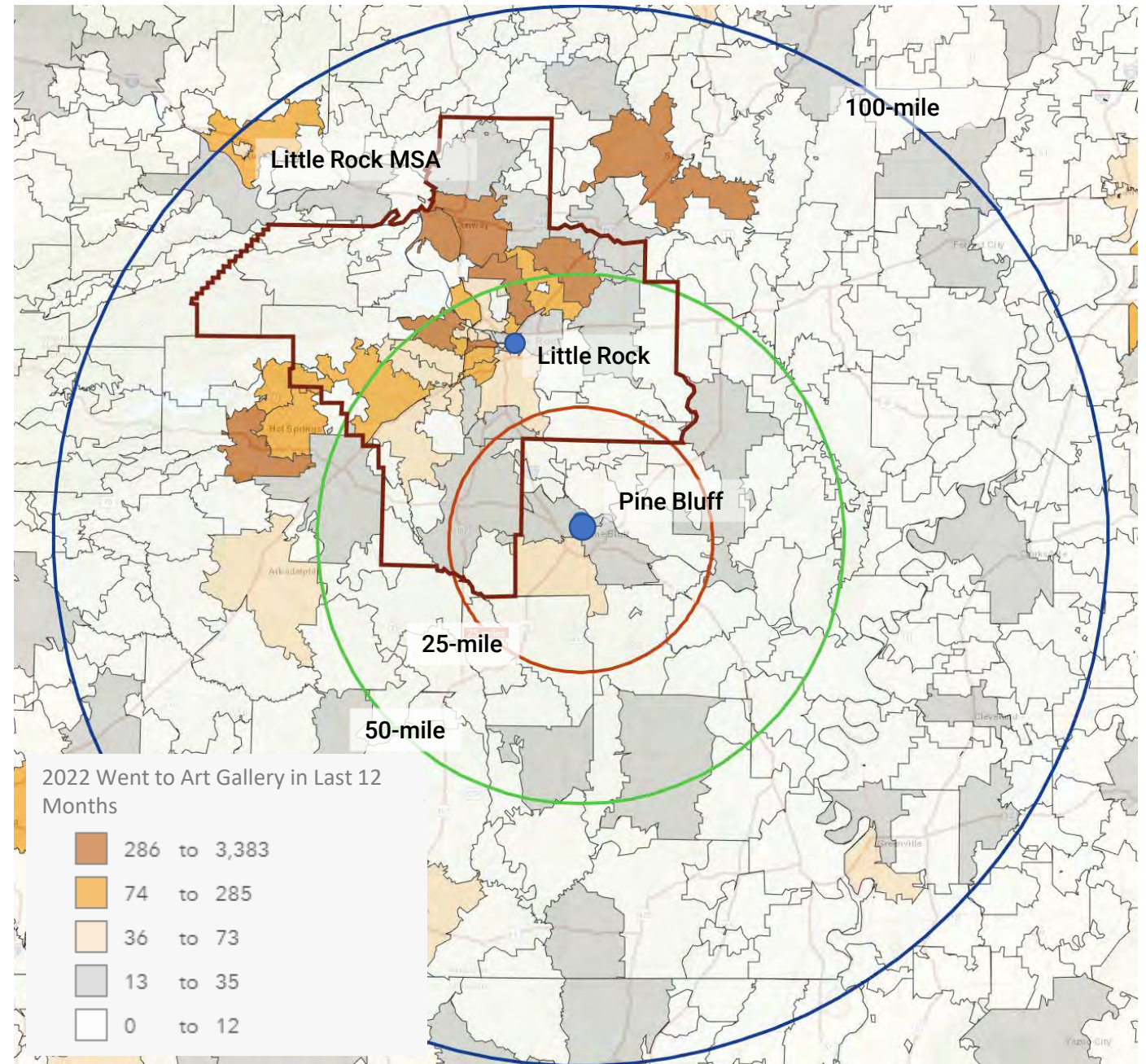
The 50-mile boundary from Pine Bluff includes zip codes with higher percentages of adults who went to an art gallery in the past year. Overall, 5.5% of adults (nearly 31,000) within 50 miles of Pine Bluff visited an art gallery recently, representing an MPI of 81.

More than 63,000 adults (representing 9.6% of total population) within 100 miles of Pine Bluff visited an art gallery in the past year, resulting in an MPI of 76.

Pine Bluff Market Data	25 miles	50 miles	100 miles
Went to Art Gallery - Number of Adults	2,820	30,708	63,642
Went to Art Gallery - Percent of Population	3.8%	5.5%	4.9%
Went to Art Gallery - Market Potential Index	56	81	73

Sources: ESRI, MRI-Simmons, Tourism Economics

Data Note: The Market Potential Index (MPI) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average. These data are based upon national propensities to use various products and services, applied to local demographic composition



Consumer Leisure Market

Visits to Live Theater

The area immediately surrounding Pine Bluff has a relatively low population base, and just 6.4% of adults (4,700) within 25 miles of Pine Bluff went to live theater in the past 12 months, representing a low market potential index (MPI) of 63.

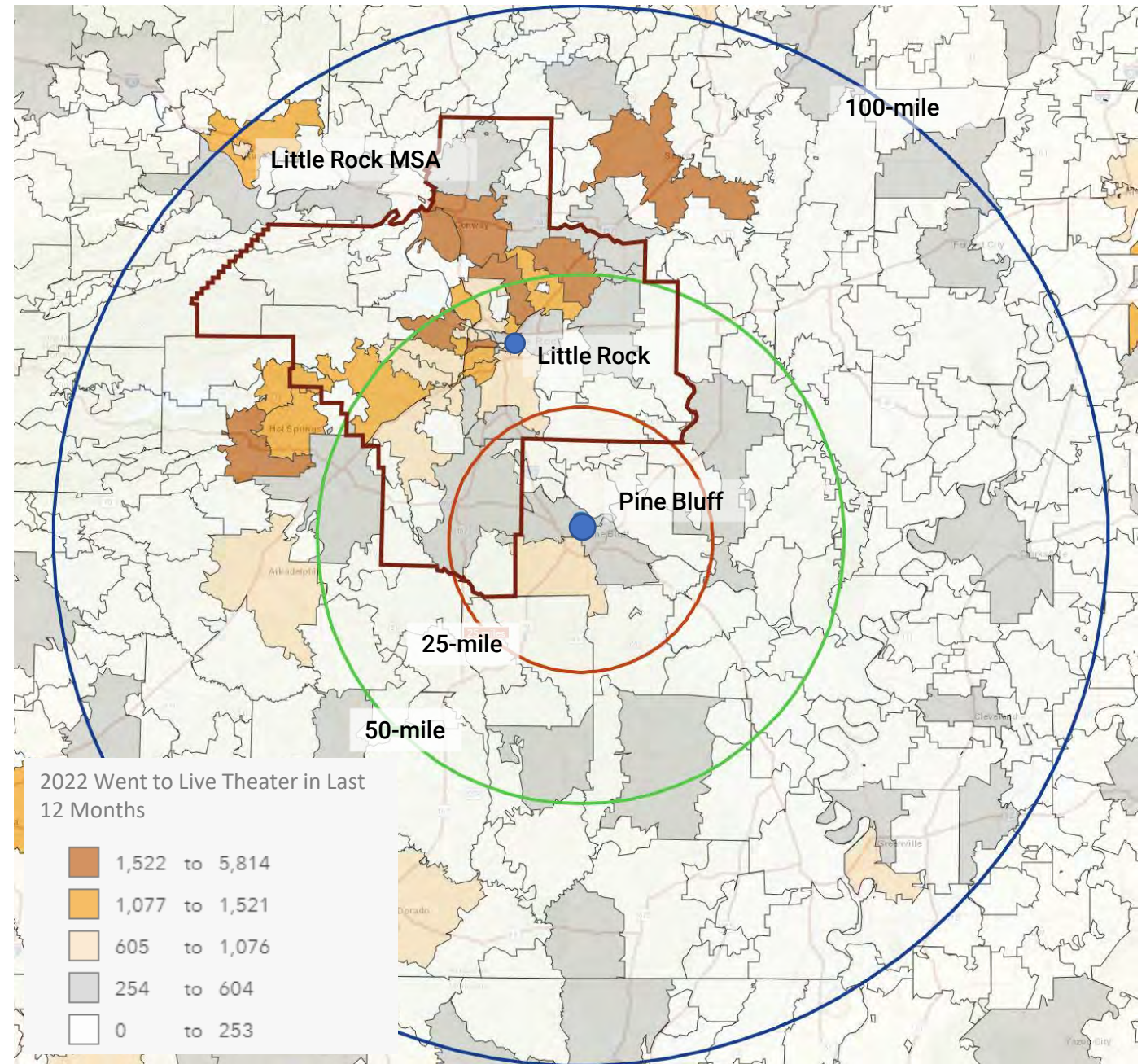
The 50-mile boundary from Pine Bluff includes zip codes with higher percentages of adults who went to live theater in the past year. Overall, 8.6% of adults (nearly 48,000) within 50 miles of Pine Bluff visited an art gallery recently, representing an MPI of 85.

More than 101,000 adults (representing 7.8% of total population) within 100 miles of Pine Bluff went to live theater in the past year, resulting in an MPI of 78.

Pine Bluff Market Data	25 miles	50 miles	100 miles
Went to Live Theater - Number of Adults	4,725	47,888	101,192
Went to Live Theater - Percent of Population	6.4%	8.6%	7.8%
Went to Live Theater - Market Potential Index	63	85	78

Sources: ESRI, MRI-Simmons, Tourism Economics

Data Note: The Market Potential Index (MPI) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average. These data are based upon national propensities to use various products and services, applied to local demographic composition



5 Existing Cultural Attractions



Comparable Site Analysis

Tourism Economics identified a set of 27 comparable cultural attractions and destinations throughout the United States, with most attractions in Arkansas and Mississippi. The research team selected the sites based on the size of the institution, the main focus of the institution (e.g., music, art, performing arts, civil rights, recreation), and location.

Examining existing cultural attractions and districts provides context for how market conditions drive and influence attendance at sites that are similar in nature to the proposed Pine Bluff district.

The accompanying table outlines the 27 attractions included in the analysis.

Attraction Name	City	State	Zip
Argenta Arts District	North Little Rock	AR	72116
B.B. King Museum & Delta Interpretive Center	Indianola	MS	38751
Bayou Teche Museum	New Iberia	LA	70560
Clarksdale Arts & Cultural District	Clarksdale	MS	38614
Crystal Bridges Museum of American Art	Bentonville	AR	72712
Delta Blues Museum	Clarksdale	MS	38614
Delta Cultural Center	Helena	AR	72342
Elvis Presley Birthplace & Museum	Tupelo	MS	38801
Gateway to the Blues Museum	Tunica Resorts	MS	38664
Grammy Museum MS	Cleveland	MS	38732
International Civil Rights Center & Museum	Greensboro	NC	27401
Julia Davis Park	Boise	ID	83702
Kinston Music Park	Kinston	NC	28501
Lillie Carrol Civil Rights Museum	Baltimore	MD	21217
Market House Theatre	Paducah	KY	42001
Mississippi Civil Rights Museum	Jackson	MS	39201
Mississippi Music Museum	Hazelhurst	MS	39083
Murphy Arts District	El Dorado	AR	71730
National Civil Rights Museum	Memphis	TN	38103
National Military Park	Vicksburg	MS	39183
National Music Museum	Vermillion	SD	57069
National Quilt Museum	Paducah	KY	42001
Preservation Hall	New Orleans	LA	70116
Rip Van Winkle Gardens	New Iberia	LA	70560
Stax Museum of American Soul Music	Memphis	TN	38106
The Legacy Museum	Montgomery	AL	36104
Yeiser Art Center	Paducah	KY	42001

Comparable Site Analysis

Population Base

The overall population base will be a main factor driving attendance at the proposed Pine Bluff cultural district. Population bases surrounding the identified sites ranged from approximately 188,000 within 50 miles of the Delta Blues Museum in Clarksdale, MS to more than 8.1 million within 50 miles of the Lillie Carrol Civil Rights Museum in Baltimore, MD.

Based on current market conditions, the Pine Bluff cultural district would rank 12th among the identified sites, with nearly 716,000 people within 50 miles of Pine Bluff.

The population base within 50 miles of Pine Bluff is similar in magnitude to Crystal Bridges Museum of American Art in Bentonville, AR, the Bayou Teche Museum in New Iberia, LA, the Mississippi Music Museum in Hazelhurst, MS, the Mississippi Civil Rights Museum in Jackson, MS, Rip Van Winkle Gardens in New Iberia, LA, and The Legacy Museum in Montgomery, AL.

Attraction	City	State	Population w/in 25 mi	Population w/in 50 mi	Population w/in 100 mi
1 Lillie Carrol Civil Rights Museum	Baltimore	MD	545,936	8,148,989	18,602,972
2 International Civil Rights Center & Museum	Greensboro	NC	1,034,602	2,318,419	8,770,398
3 Preservation Hall	New Orleans	LA	949,831	1,642,016	3,184,557
4 National Civil Rights Museum	Memphis	TN	1,171,756	1,440,359	2,603,705
5 Stax Museum of American Soul Music	Memphis	TN	1,179,937	1,440,147	2,603,652
6 Gateway to the Blues Museum	Tunica Resorts	MS	193,056	1,404,352	2,542,585
7 Kinston Music Park	Kinston	NC	248,561	1,038,640	4,587,368
8 Argenta Arts District	North Little Rock	AR	640,246	1,010,982	1,574,017
9 Julia Davis Park	Boise	ID	760,852	881,485	969,087
10 Crystal Bridges Museum of American Art	Bentonville	AR	545,880	849,984	3,011,656
11 Bayou Teche Museum	New Iberia	LA	280,514	796,892	2,639,373
12 Pine Bluff	Pine Bluff	AR	93,077	715,066	1,645,604
13 Mississippi Music Museum	Hazelhurst	MS	94,873	699,369	1,878,857
14 Mississippi Civil Rights Museum	Jackson	MS	492,397	689,568	1,592,616
15 Rip Van Winkle Gardens	New Iberia	LA	410,490	651,699	2,362,624
16 The Legacy Museum	Montgomery	AL	369,119	622,572	3,075,842
17 National Military Park	Vicksburg	MS	65,412	576,647	1,471,393
18 Delta Cultural Center	Helena	AR	52,171	442,857	2,535,511
19 Elvis Presley Birthplace & Museum	Tupelo	MS	175,180	431,011	2,760,405
20 National Quilt Museum	Paducah	KY	152,949	386,211	2,197,271
21 Yeiser Art Center	Paducah	KY	153,768	385,785	2,199,392
22 Market House Theatre	Paducah	KY	153,918	385,764	2,199,699
23 National Music Museum	Vermillion	SD	48,727	347,897	1,002,883
24 Murphy Arts District	El Dorado	AR	48,518	224,280	1,582,912
25 B.B. King Museum & Delta Interpretive Center	Indianola	MS	10,042	206,106	1,341,510
26 Grammy Museum MS	Cleveland	MS	56,935	204,365	1,258,518
27 Clarksdale arts & cultural district	Clarksdale	MS	48,771	188,211	2,212,123
28 Delta Blues Museum	Clarksdale	MS	48,329	187,989	2,210,453

Sources: US Census Bureau, ESRI, Tourism Economics

Data Note: Ranks are based on population within 50 miles

Comparable Site Analysis

Household Income

Similar to the overall population base, household income will be a key factor driving attendance at the proposed Pine Bluff cultural district. Median household income for the population surrounding the identified sites ranged from approximately \$32,000 within 50 miles of the B.B. King Museum in Indianola, MA to nearly \$102,000 for the population within 50 miles of the Lillie Carrol Civil Rights Museum in Baltimore, MD.

The Pine Bluff cultural district would rank 13th among the identified sites (compared to the population base, which ranked 12th), with a median household income of slightly over \$55,000 within 50 miles of Pine Bluff.

The median household income within 50 miles of Pine Bluff is similar in magnitude to the Bayou Teche Museum in New Iberia, LA, the Argenta Arts District in North Little Rock, AR, the Mississippi Music Museum in Hazelhurst, MS, the Mississippi Civil Rights Museum in Jackson, MS, Rip Van Winkle Gardens in New Iberia, LA, and The Legacy Museum in Montgomery, AL.

Attraction	City	State	Median HH	Median HH	Median HH	
			Income	Income	Income	
			w/in 25 mi	w/in 50 mi	w/in 100 mi	
1	Lillie Carrol Civil Rights Museum	Baltimore	MD	\$53,941	\$101,558	\$88,766
2	Julia Davis Park	Boise	ID	\$75,907	\$73,075	\$71,850
3	National Music Museum	Vermillion	SD	\$60,479	\$68,723	\$65,980
4	Preservation Hall	New Orleans	LA	\$57,018	\$59,137	\$58,543
5	Crystal Bridges Museum of American Art	Bentonville	AR	\$64,176	\$58,436	\$55,350
6	National Civil Rights Museum	Memphis	TN	\$60,062	\$58,383	\$53,193
7	Stax Museum of American Soul Music	Memphis	TN	\$60,208	\$58,380	\$53,133
8	International Civil Rights Center & Museum	Greensboro	NC	\$56,718	\$58,186	\$65,516
9	Gateway to the Blues Museum	Tunica Resorts	MS	\$53,743	\$57,814	\$53,228
10	Bayou Teche Museum	New Iberia	LA	\$64,090	\$56,058	\$59,525
11	Argenta Arts District	North Little Rock	AR	\$58,313	\$55,833	\$52,397
12	Rip Van Winkle Gardens	New Iberia	LA	\$61,050	\$55,758	\$59,056
13	Pine Bluff	Pine Bluff	AR	\$45,164	\$55,005	\$51,482
14	The Legacy Museum	Montgomery	AL	\$59,316	\$54,579	\$56,206
15	Mississippi Civil Rights Museum	Jackson	MS	\$58,805	\$54,505	\$46,247
16	Mississippi Music Museum	Hazelhurst	MS	\$51,353	\$53,819	\$51,810
17	National Military Park	Vicksburg	MS	\$45,923	\$53,451	\$46,315
18	National Quilt Museum	Paducah	KY	\$54,142	\$52,625	\$54,534
19	Yeiser Art Center	Paducah	KY	\$54,072	\$52,600	\$54,526
20	Market House Theatre	Paducah	KY	\$54,027	\$52,592	\$54,530
21	Kinston Music Park	Kinston	NC	\$52,001	\$51,567	\$63,781
22	Delta Cultural Center	Helena	AR	\$32,931	\$48,209	\$53,115
23	Elvis Presley Birthplace & Museum	Tupelo	MS	\$50,623	\$47,356	\$53,341
24	Murphy Arts District	El Dorado	AR	\$47,338	\$42,434	\$48,233
25	Clarksdale arts & cultural district	Clarksdale	MS	\$29,086	\$39,698	\$52,979
26	Delta Blues Museum	Clarksdale	MS	\$29,063	\$39,622	\$52,980
27	Grammy Museum MS	Cleveland	MS	\$32,239	\$32,555	\$47,677
28	B.B. King Museum	Indianola	MS	\$31,783	\$32,035	\$48,139

Sources: US Census Bureau, ESRI, Tourism Economics	Average	\$51,913	\$54,428	\$56,158
Data Note: Ranks are based on median household income within 50 miles	Low	\$29,063	\$32,035	\$46,247
	High	\$75,907	\$101,558	\$88,766

Comparable Site Analysis

Entertainment/Recreation Spending

Current levels of household spending on entertainment and recreation will be a key factor underlying visitation to the proposed Pine Bluff cultural district. Current spending levels for households surrounding the identified sites ranged from approximately \$159 million within 50 miles of the B.B. King Museum in Indianola, MS to nearly \$16 billion within 50 miles of the Lillie Carrol Civil Rights Museum in Baltimore, MD.

Based on current spending levels, the Pine Bluff cultural district would rank 12th among the identified sites, with nearly \$846 million in entertainment in recreation spending by households within 50 miles of Pine Bluff.

The level of entertainment and recreation spending within 50 miles of Pine Bluff is similar in magnitude to Crystal Bridges Museum of American Art in Bentonville, AR, the Bayou Teche Museum in New Iberia, LA, the Mississippi Music Museum in Hazelhurst, MS, the Mississippi Civil Rights Museum in Jackson, MS, Rip Van Winkle Gardens in New Iberia, LA, and The Legacy Museum in Montgomery, AL.

			\$ Millions			
Attraction	City	State	Entertainment/ Rec Spending w/in 25 mi	Entertainment/ Rec Spending w/in 50 mi	Entertainment/ Rec Spending w/in 100 mi	
1	Lillie Carrol Civil Rights Museum	Baltimore	MD	\$739.3	\$15,566.2	\$31,505.1
2	International Civil Rights Center & Museum	Greensboro	NC	\$1,190.3	\$2,906.5	\$11,850.8
3	Preservation Hall	New Orleans	LA	\$1,187.0	\$2,033.3	\$3,855.5
4	National Civil Rights Museum	Memphis	TN	\$1,452.9	\$1,744.9	\$2,956.3
5	Stax Museum of American Soul Music	Memphis	TN	\$1,466.2	\$1,744.6	\$2,954.2
6	Gateway to the Blues Museum	Tunica Resorts	MS	\$188.3	\$1,690.2	\$2,873.0
7	Argenta Arts District	North Little Rock	AR	\$781.4	\$1,184.7	\$1,768.7
8	Julia Davis Park	Boise	ID	\$992.8	\$1,122.2	\$1,235.1
9	Kinston Music Park	Kinston	NC	\$264.4	\$1,070.1	\$5,997.0
10	Crystal Bridges Museum of American Art	Bentonville	AR	\$681.6	\$1,021.7	\$3,474.6
11	Bayou Teche Museum	New Iberia	LA	\$373.1	\$959.9	\$3,175.7
12	Pine Bluff	Pine Bluff	AR	\$92.0	\$845.5	\$1,805.8
13	Mississippi Music Museum	Hazelhurst	MS	\$98.3	\$785.9	\$2,027.5
14	Mississippi Civil Rights Museum	Jackson	MS	\$584.9	\$770.8	\$1,623.1
15	Rip Van Winkle Gardens	New Iberia	LA	\$513.4	\$769.4	\$2,822.9
16	The Legacy Museum	Montgomery	AL	\$437.4	\$715.0	\$3,703.6
17	National Military Park	Vicksburg	MS	\$65.7	\$637.8	\$1,498.8
18	Elvis Presley Birthplace & Museum	Tupelo	MS	\$194.8	\$454.3	\$3,176.9
19	National Quilt Museum	Paducah	KY	\$180.1	\$452.1	\$2,517.0
20	Yeiser Art Center	Paducah	KY	\$180.8	\$451.3	\$2,518.8
21	Market House Theatre	Paducah	KY	\$180.9	\$451.2	\$2,519.3
22	National Music Museum	Vermillion	SD	\$64.7	\$448.7	\$1,333.1
23	Delta Cultural Center	Helena	AR	\$40.5	\$417.8	\$2,854.3
24	Murphy Arts District	El Dorado	AR	\$53.8	\$224.8	\$1,662.8
25	Grammy Museum MS	Cleveland	MS	\$41.3	\$163.5	\$1,273.5
26	Clarksdale arts & cultural district	Clarksdale	MS	\$33.6	\$161.9	\$2,487.7
27	Delta Blues Museum	Clarksdale	MS	\$33.3	\$161.5	\$2,485.8
28	B.B. King Museum	Indianola	MS	\$7.2	\$159.0	\$1,384.4

Sources: US Census Bureau, ESRI, Tourism Economics	Average	\$432.9	\$1,397.0	\$3,905.0
Data Note: Ranks are based on spending within 50 miles	Low	\$7.2	\$159.0	\$1,235.1
	High	\$1,466.2	\$15,566.2	\$31,505.1

Comparable Site Analysis

Travel Spending

Based on current spending levels, the Pine Bluff cultural district would potentially rank 12th among the identified sites in terms of household spending on travel, with nearly \$622 million in travel spending by households within 50 miles of Pine Bluff.

Attraction	City	State	\$ Millions			
			Travel Spending w/in 25 mi	Travel Spending w/in 50 mi	Travel Spending w/in 100 mi	
1	Lillie Carrol Civil Rights Museum	Baltimore	MD	\$558.9	\$12,672.3	\$25,229.1
2	International Civil Rights Center & Museum	Greensboro	NC	\$895.8	\$2,162.5	\$8,924.8
3	Preservation Hall	New Orleans	LA	\$907.2	\$1,535.9	\$2,866.2
4	National Civil Rights Museum	Memphis	TN	\$1,127.0	\$1,320.1	\$2,117.7
5	Stax Museum of American Soul Music	Memphis	TN	\$1,137.7	\$1,319.7	\$2,115.2
6	Gateway to the Blues Museum	Tunica Resorts	MS	\$142.2	\$1,281.8	\$2,071.5
7	Argenta Arts District	North Little Rock	AR	\$595.7	\$878.9	\$1,250.2
8	Julia Davis Park	Boise	ID	\$780.5	\$869.4	\$949.0
9	Kinston Music Park	Kinston	NC	\$190.1	\$774.7	\$4,522.0
10	Crystal Bridges Museum of American Art	Bentonville	AR	\$524.6	\$752.4	\$2,524.2
11	Bayou Teche Museum	New Iberia	LA	\$272.8	\$678.3	\$2,313.0
12	Pine Bluff	Pine Bluff	AR	\$63.7	\$621.7	\$1,280.9
13	Mississippi Music Museum	Hazlehurst	MS	\$67.6	\$573.0	\$1,424.1
14	Mississippi Civil Rights Museum	Jackson	MS	\$449.5	\$565.9	\$1,121.8
15	Rip Van Winkle Gardens	New Iberia	LA	\$374.0	\$537.1	\$2,043.0
16	The Legacy Museum	Montgomery	AL	\$330.4	\$512.1	\$2,691.2
17	National Military Park	Vicksburg	MS	\$46.5	\$472.8	\$1,036.8
18	National Music Museum	Vermillion	SD	\$43.1	\$316.2	\$927.1
19	National Quilt Museum	Paducah	KY	\$124.6	\$302.5	\$1,749.5
20	Yeiser Art Center	Paducah	KY	\$125.0	\$301.9	\$1,750.8
21	Market House Theatre	Paducah	KY	\$125.1	\$301.8	\$1,751.2
22	Elvis Presley Birthplace & Museum	Tupelo	MS	\$133.3	\$300.7	\$2,259.1
23	Delta Cultural Center	Helena	AR	\$27.1	\$298.5	\$2,077.1
24	Murphy Arts District	El Dorado	AR	\$33.8	\$145.5	\$1,159.9
25	Grammy Museum MS	Cleveland	MS	\$28.1	\$109.5	\$885.7
26	Clarksdale arts & cultural district	Clarksdale	MS	\$22.4	\$107.6	\$1,805.6
27	Delta Blues Museum	Clarksdale	MS	\$22.2	\$107.3	\$1,804.4
28	B.B. King Museum	Indianola	MS	\$5.1	\$105.7	\$968.8

Sources: US Census Bureau, ESRI, Tourism Economics
 Data Note: Ranks are based on spending within 50 miles

Average	\$326.9	\$1,068.8	\$2,915.0
Low	\$5.1	\$105.7	\$885.7
High	\$1,137.7	\$12,672.3	\$25,229.1

Comparable Site Analysis

Spending on Tickets to Parks & Museums

Based on current spending levels, the Pine Bluff cultural district could potentially rank 12th among the identified sites in terms of household spending on tickets to parks and museums, with nearly \$9 million in spending by households within 50 miles of Pine Bluff.

			\$ Millions			
Attraction	City	State	Spend on Tix	Spend on Tix	Spend on Tix	
			to Parks & Museums 25 mi	to Parks & Museums 50 mi	to Parks & Museums 100 mi	
1	Lillie Carrol Civil Rights Museum	Baltimore	MD	\$7.4	\$165.9	\$330.6
2	International Civil Rights Center & Museum	Greensboro	NC	\$12.1	\$29.2	\$122.9
3	Preservation Hall	New Orleans	LA	\$12.1	\$20.7	\$39.3
4	Stax Museum of American Soul Music	Memphis	TN	\$15.4	\$18.1	\$29.4
5	National Civil Rights Museum	Memphis	TN	\$15.2	\$18.1	\$29.4
6	Gateway to the Blues Museum	Tunica Resorts	MS	\$1.9	\$17.5	\$28.7
7	Julia Davis Park	Boise	ID	\$10.8	\$12.1	\$13.1
8	Argenta Arts District	North Little Rock	AR	\$8.1	\$12.0	\$17.4
9	Kinston Music Park	Kinston	NC	\$2.7	\$10.9	\$63.1
10	Crystal Bridges Museum of American Art	Bentonville	AR	\$7.3	\$10.4	\$34.4
11	Bayou Teche Museum	New Iberia	LA	\$3.8	\$9.6	\$32.1
12	Pine Bluff	Pine Bluff	AR	\$0.9	\$8.5	\$17.8
13	Mississippi Music Museum	Hazlehurst	MS	\$1.0	\$8.0	\$20.3
14	Mississippi Civil Rights Museum	Jackson	MS	\$6.1	\$7.8	\$16.0
15	Rip Van Winkle Gardens	New Iberia	LA	\$5.2	\$7.7	\$28.5
16	The Legacy Museum	Montgomery	AL	\$4.5	\$7.1	\$37.1
17	National Military Park	Vicksburg	MS	\$0.6	\$6.5	\$14.8
18	Elvis Presley Birthplace & Museum	Tupelo	MS	\$1.9	\$4.3	\$31.6
19	National Music Museum	Vermillion	SD	\$0.6	\$4.3	\$12.5
20	National Quilt Museum	Paducah	KY	\$1.7	\$4.2	\$24.0
21	Yeiser Art Center	Paducah	KY	\$1.7	\$4.2	\$24.0
22	Market House Theatre	Paducah	KY	\$1.7	\$4.2	\$24.0
23	Delta Cultural Center	Helena	AR	\$0.4	\$4.1	\$28.7
24	Murphy Arts District	El Dorado	AR	\$0.5	\$2.1	\$16.2
25	Clarksdale arts & cultural district	Clarksdale	MS	\$0.3	\$1.5	\$25.0
26	Delta Blues Museum	Clarksdale	MS	\$0.3	\$1.5	\$25.0
27	Grammy Museum MS	Cleveland	MS	\$0.4	\$1.5	\$12.5
28	B.B. King Museum	Indianola	MS	\$0.1	\$1.5	\$13.6

Sources: US Census Bureau, ESRI, Tourism Economics	Average	\$4.5	\$14.4	\$39.7
Data Note: Ranks are based on spending within 50 miles	Low	\$0.1	\$1.5	\$12.5
	High	\$15.4	\$165.9	\$330.6

Comparable Site Analysis

Employment Base

The employment base provides context on the amount of business activity in the regions surrounding cultural attractions. The number of employees surrounding the identified sites ranged from approximately 70,000 within 50 miles of the B.B. King Museum in Indianola, MA to nearly 4.3 million employees within 50 miles of the Lillie Carrol Civil Rights Museum in Baltimore, MD.

Similar to the population base and median household income, the Pine Bluff cultural district is in the middle of the pack and would rank 12th among the identified sites in terms of employment base, with approximately 336,000 employees within 50 miles of Pine Bluff. This employment base is similar in magnitude to the Bayou Teche Museum in New Iberia, LA, the Argenta Arts District in North Little Rock, AR, the Mississippi Music Museum in Hazelhurst, MS, the Mississippi Civil Rights Museum in Jackson, MS, Rip Van Winkle Gardens in New Iberia, LA, and The Legacy Museum in Montgomery, AL.

Attraction	City	State	Total Employees w/in 25 mi	Total Employees w/in 50 mi	Total Employees w/in 100 mi	
1	Lillie Carrol Civil Rights Museum	Baltimore	MD	261,362	4,266,101	9,389,618
2	International Civil Rights Center & Museum	Greensboro	NC	474,550	1,091,798	4,197,688
3	Preservation Hall	New Orleans	LA	436,531	752,631	1,465,531
4	National Civil Rights Museum	Memphis	TN	601,503	718,230	1,227,601
5	Stax Museum of American Soul Music	Memphis	TN	605,870	717,761	1,227,483
6	Gateway to the Blues Museum	Tunica Resorts	MS	90,814	700,211	1,191,730
7	Argenta Arts District	North Little Rock	AR	309,483	476,425	704,791
8	Kinston Music Park	Kinston	NC	121,270	462,023	2,169,809
9	Julia Davis Park	Boise	ID	362,539	413,052	454,133
10	Crystal Bridges Museum of American Art	Bentonville	AR	269,406	411,590	1,444,432
11	Bayou Teche Museum	New Iberia	LA	140,060	381,327	1,228,747
12	Pine Bluff	Pine Bluff	AR	40,633	335,743	730,413
13	Mississippi Civil Rights Museum	Jackson	MS	233,830	314,516	674,014
14	Mississippi Music Museum	Hazelhurst	MS	41,395	313,881	814,110
15	Rip Van Winkle Gardens	New Iberia	LA	204,663	309,976	1,091,739
16	The Legacy Museum	Montgomery	AL	158,373	265,352	1,358,261
17	National Military Park	Vicksburg	MS	28,033	260,294	617,980
18	Delta Cultural Center	Helena	AR	20,737	194,228	1,186,135
19	Elvis Presley Birthplace & Museum	Tupelo	MS	81,131	190,984	1,275,923
20	National Music Museum	Vermillion	SD	26,150	179,828	539,694
21	National Quilt Museum	Paducah	KY	65,048	165,090	976,934
22	Yeiser Art Center	Paducah	KY	65,366	164,888	977,826
23	Market House Theatre	Paducah	KY	65,427	164,879	978,004
24	Murphy Arts District	El Dorado	AR	20,060	94,191	690,586
25	Grammy Museum MS	Cleveland	MS	18,152	73,289	538,506
26	Clarksdale arts & cultural district	Clarksdale	MS	17,485	72,856	1,029,931
27	Delta Blues Museum	Clarksdale	MS	17,319	72,730	1,029,149
28	B.B. King Museum	Indianola	MS	3,659	70,252	569,739

Sources: US Census Bureau, ESRI, Tourism Economics	Average	170,745	486,933	1,420,732
Data Note: Ranks are based on number of employees within 50 miles	Low	3,659	70,252	454,133
	High	605,870	4,266,101	9,389,618



6 Estimated Visitation & Visitor Spending

Estimated Visitation

Attendance At Existing Sites

The set of 27 existing cultural sites and districts had a broad range of estimated attendance in 2019. Tourism Economics estimated annual attendance in 2019 for each cultural site based on published data and mobile geolocation data from Near (formerly UberMedia).

The Mississippi Music Museum in Hazelhurst, MS had approximately 3,000 visits in 2019, while the National Civil Rights Museum and Julia Davis Park welcomed approximately 339,000 and 537,000 visits, respectively. On average, the 27 sites had slightly over 144,000 visits in 2019.

The analysis references 2019 attendance figures since attendance figures in 2020 and 2021 were influenced by the COVID-19 pandemic. 2019 represents the most recent reference year when attendance was not negatively impacted by COVID-19.

	Attraction	City	State	Estimated Attendance
1	Julia Davis Park	Boise	ID	537,000
2	National Military Park	Vicksburg	MS	500,000
3	Clarksdale arts & cultural district	Clarksdale	MS	422,000
4	The Legacy Museum	Montgomery	AL	400,000
5	Argenta Arts District	N. Little Rock	AR	372,000
6	National Civil Rights Museum	Memphis	TN	339,000
7	Crystal Bridges Museum of American Art	Bentonville	AR	300,000
8	Mississippi Civil Rights Museum	Jackson	MS	300,000
9	Preservation Hall	New Orleans	LA	150,000
10	Murphy Arts District	El Dorado	AR	121,000
11	Rip Van Winkle Gardens	New Iberia	LA	120,000
12	Elvis Presley Birthplace & Museum	Tupelo	MS	100,000
13	Bayou Teche Museum	New Iberia	LA	94,000
14	International Civil Rights Center & Museum	Greensboro	NC	90,000
15	Grammy Museum MS	Cleveland	MS	89,000
16	Yeiser Art Center	Paducah	KY	52,000
17	Stax Museum of American Soul Music	Memphis	TN	50,000
18	Lillie Carrol Civil Rights Museum	Baltimore	MD	48,000
19	Market House Theatre	Paducah	KY	40,000
20	National Quilt Museum	Paducah	KY	40,000
21	Gateway to the Blues Museum	Tunica Resorts	MS	34,000
22	B.B. King Museum	Indianola	MS	30,000
23	Delta Blues Museum	Clarksdale	MS	25,000
24	Delta Cultural Center	Helena	AR	12,000
25	National Music Museum	Vermillion	SD	10,000
26	Kinston Music Park	Kinston	NC	7,000
27	Mississippi Music Museum	Hazelhurst	MS	3,000

Sources: Tourism Economics, Near, published attendance figures

Average Attendance	144,456
Low Attendance	3,000
High Attendance	537,000

Comparable Site Analysis

Visitor Origin

Based on the mobile geolocation from Near, Tourism Economics estimated the shares of visitors originating from 1 to 25 miles, 25 to 50 miles, and greater than 50 miles from each cultural site. The accompanying table summarizes the shares of visitors' origins for each identified site.

Attraction	City	State	% of visitors	% of visitors	% of visitors
			who traveled <25 miles	who traveled 25 to 50 mi	who traveled > 50 mi
Argenta Arts District	North Little Rock	AR	82%	6%	12%
Bayou Teche Museum	New Iberia	LA	92%	3%	5%
B.B. King Museum	Indianola	MS	63%	9%	28%
Clarksdale arts & cultural district	Clarksdale	MS	79%	7%	14%
Crystal Bridges Museum of American Art	Bentonville	AR	57%	3%	39%
Delta Blues Museum	Clarksdale	MS	53%	2%	45%
Delta Cultural Center	Helena	AR	65%	6%	29%
Grammy Museum MS	Cleveland	MS	71%	5%	23%
Elvis Presley Birthplace & Museum	Tupelo	MS	32%	4%	64%
Gateway to the Blues Museum	Tunica Resorts	MS	57%	20%	23%
International Civil Rights Center & Museum	Greensboro	NC	69%	4%	27%
Julia Davis Park	Boise	ID	79%	3%	18%
Market House Theatre	Paducah	KY	76%	7%	17%
Mississippi Civil Rights Museum	Jackson	MS	68%	6%	26%
Mississippi Music Museum	Hazelhurst	MS	92%	6%	1%
Murphy Arts District	El Dorado	AR	73%	12%	15%
National Civil Rights Museum	Memphis	TN	46%	2%	51%
National Military Park	Vicksburg	MS	52%	5%	42%
National Music Museum	Vermillion	SD	58%	10%	31%
National Quilt Museum	Paducah	KY	45%	6%	49%
Preservation Hall	New Orleans	LA	37%	3%	60%
Rip Van Winkle Gardens	New Iberia	LA	79%	5%	16%
Stax Museum of American Soul Music	Memphis	TN	75%	1%	24%
The Legacy Museum	Montgomery	AL	53%	18%	29%
Yeiser Art Center	Paducah	KY	69%	6%	26%
Kinston Music Park	Kinston	NC	52%	12%	36%
Lillie Carrol Civil Rights Museum	Baltimore	MD	90%	2%	8%

Sources: Tourism Economics, Near

Average	65%	6%	28%
Low	32%	1%	1%
High	92%	20%	64%

Estimated Visitation

Visitation Penetration Rates

Based on estimated visitation and demographic data previously outlined, Tourism Economics analyzed visitation penetration rates at the 27 identified cultural sites and attractions.

Penetration rates represent attendance as a percentage of total population base for the following groups:

- Number of visits originating 1 to 25 miles from the cultural site
- Number of visits originating 25 to 50 miles from the cultural site
- Number of visits originating greater than 50 miles from the cultural site

The accompanying table outlines the calculated penetration rates for each site. It is important to note that visits do not represent unique visitors. Penetration rates greater than 100% indicate sites where residents visited a site or district multiple times throughout the year, which is why the number of visits exceeds the population in the given area.

Attraction	City	State	2019 Attendance	# of Visits (<25 mi)	# of Visits (25 to 50 mi)	# of Visits (>50 mi)	# of Visits as % of Population Base (<25 mi)	# of Visits as % of Population Base (25 to 50 mi)	# of Visits as % of Population Base (50 to 100 mi)
Argenta Arts District	North Little Rock	AR	372,000	306,650	21,648	43,702	47.90%	5.84%	2.78%
Bayou Teche Museum	New Iberia	LA	94,000	62,057	20,699	11,244	22.12%	4.01%	0.43%
B.B. King Museum	Indianola	MS	30,000	1,681	21,606	6,714	16.74%	11.02%	0.50%
Clarksdale arts & cultural district	Clarksdale	MS	422,000	143,558	126,600	151,842	294.35%	90.79%	6.86%
Crystal Bridges Museum of American Art	Bentonville	AR	300,000	172,491	9,182	118,326	31.60%	3.02%	3.93%
Delta Blues Museum	Clarksdale	MS	25,000	13,253	602	11,145	27.42%	0.43%	0.50%
Delta Cultural Center	Helena	AR	12,000	5,762	2,642	3,596	11.04%	0.68%	0.14%
Grammy Museum MS	Cleveland	MS	89,000	17,800	37,396	33,804	31.26%	25.37%	2.69%
Elvis Presley Birthplace & Museum	Tupelo	MS	100,000	32,222	4,074	63,704	18.39%	1.59%	2.31%
Gateway to the Blues Museum	Tunica Resorts	MS	34,000	19,488	6,634	7,878	10.09%	0.55%	0.31%
International Civil Rights Center & Museum	Greensboro	NC	75,000	51,833	3,092	20,074	5.01%	0.24%	0.23%
Julia Davis Park	Boise	ID	537,000	423,155	16,813	97,032	55.62%	13.94%	10.01%
Market House Theatre	Paducah	KY	40,000	30,588	2,614	6,797	19.87%	1.13%	0.31%
Mississippi Civil Rights Museum	Jackson	MS	300,000	145,806	78,056	76,139	29.61%	39.59%	4.78%
Mississippi Music Museum	Hazelhurst	MS	2,000	1,240	600	159	1.31%	0.10%	0.01%
Murphy Arts District	El Dorado	AR	121,000	88,875	13,992	18,133	183.18%	7.96%	1.15%
National Civil Rights Museum	Memphis	TN	339,000	157,590	7,839	173,570	13.45%	2.92%	6.67%
National Military Park	Vicksburg	MS	500,000	210,093	165,093	124,815	321.18%	32.29%	8.48%
National Music Museum	Vermillion	SD	10,000	5,838	1,040	3,121	11.98%	0.35%	0.31%
National Quilt Museum	Paducah	KY	40,000	13,244	7,243	19,513	8.66%	3.11%	0.89%
Preservation Hall	New Orleans	LA	150,000	55,022	4,454	90,524	5.79%	0.64%	2.84%
Rip Van Winkle Gardens	New Iberia	LA	120,000	95,023	5,973	19,005	23.15%	2.48%	0.80%
Stax Museum of American Soul Music	Memphis	TN	50,000	37,348	455	12,197	3.17%	0.17%	0.47%
The Legacy Museum	Montgomery	AL	400,000	228,074	102,407	69,519	61.79%	40.40%	2.26%
Yeiser Art Center	Paducah	KY	52,000	35,845	2,861	13,294	23.31%	1.23%	0.60%
Kinston Music Park	Kinston	NC	7,000	3,640	840	2,520	1.46%	0.11%	0.05%
Lillie Carrol Civil Rights Museum	Baltimore	MD	48,000	43,265	861	3,874	7.92%	0.01%	0.02%

Source: Tourism Economics

	Average	Low	High
# of Visits as % of Population Base (<25 mi)	47.68%	1.31%	321.18%
# of Visits as % of Population Base (25 to 50 mi)	10.74%	0.01%	90.79%
# of Visits as % of Population Base (50 to 100 mi)	2.23%	0.01%	10.01%

Estimated Visitation

Potential Visitation to Pine Bluff Cultural District

Based on the comparable site analysis in the previous section, Tourism Economics identified a subset of the 27 sites that align with Pine Bluff in terms of population base, employment base, household income, and household spending. As shown below, the selected sites averaged approximately 71,000 visits in 2019. Approximately 30.1% of visitors originated from 1 to 25 miles from the attractions, 8.0% originated from 25 to 50 miles, and 1.2% originated from 50 or more miles from the attractions.

The analysis assumes that the penetration rates (number of visits as a percentage of population) at 1 to 25 miles, 25 to 50 miles, and greater than 50 miles for the proposed Pine Bluff cultural district will be equal to the average respective penetration rates across the subset of existing cultural sites and attractions. Applying these penetration rates to the population bases for 1 to 25 miles, 25 to 50 miles, and greater than 50 miles (as previously outlined in the section outlining Pine Bluff market demographics) yields estimated potential visitation levels of approximately 28,000 visits from 1 to 25 miles, nearly 57,000 visits from 25 to 50 miles, and 19,000 visits from greater than 50 miles.

Overall, current market demographics and visitation at existing cultural sites indicates that the proposed Pine Bluff cultural district could attract approximately 100,000 visits on an annual basis. It is important to note that the analysis does not consider the levels of public/private funding, marketing spending of the existing cultural attractions, or policy implications, which are key factors in driving visitation.

Attraction	City	State	2019 Attendance	# of Visits			# of Visits as % of Population		
				(< 25 miles)	(25 to 50 miles)	(>50 miles)	(<25 miles)	(25 to 50 miles)	(>50 miles)
Bayou Teche Museum	New Iberia	LA	94,000	62,057	20,699	11,244	22.1%	4.0%	0.4%
Delta Blues Museum	Clarksdale	MS	25,000	13,253	602	11,145	27.4%	0.4%	0.5%
Grammy Museum MS	Cleveland	MS	89,000	17,800	37,396	33,804	31.3%	25.4%	2.7%
Elvis Presley Birthplace & Museum	Tupelo	MS	100,000	32,222	4,074	63,704	18.4%	1.6%	2.3%
Murphy Arts District	El Dorado	AR	121,000	50,842	43,582	26,576	104.8%	24.8%	1.7%
National Quilt Museum	Paducah	KY	40,000	13,244	7,243	19,513	8.7%	3.1%	0.9%
Stax Museum of American Soul Music	Memphis	TN	50,000	37,348	455	12,197	3.2%	0.2%	0.5%
Yeiser Art Center	Paducah	KY	52,000	35,845	2,861	13,294	23.3%	1.2%	0.6%
Average, selected sites			71,375	32,826	14,614	23,935	30.1%	8.0%	1.2%
Estimated potential visits to Pine Bluff cultural district			104,104	28,028	56,995	19,081	30.1%	8.0%	1.2%

Source: Tourism Economics

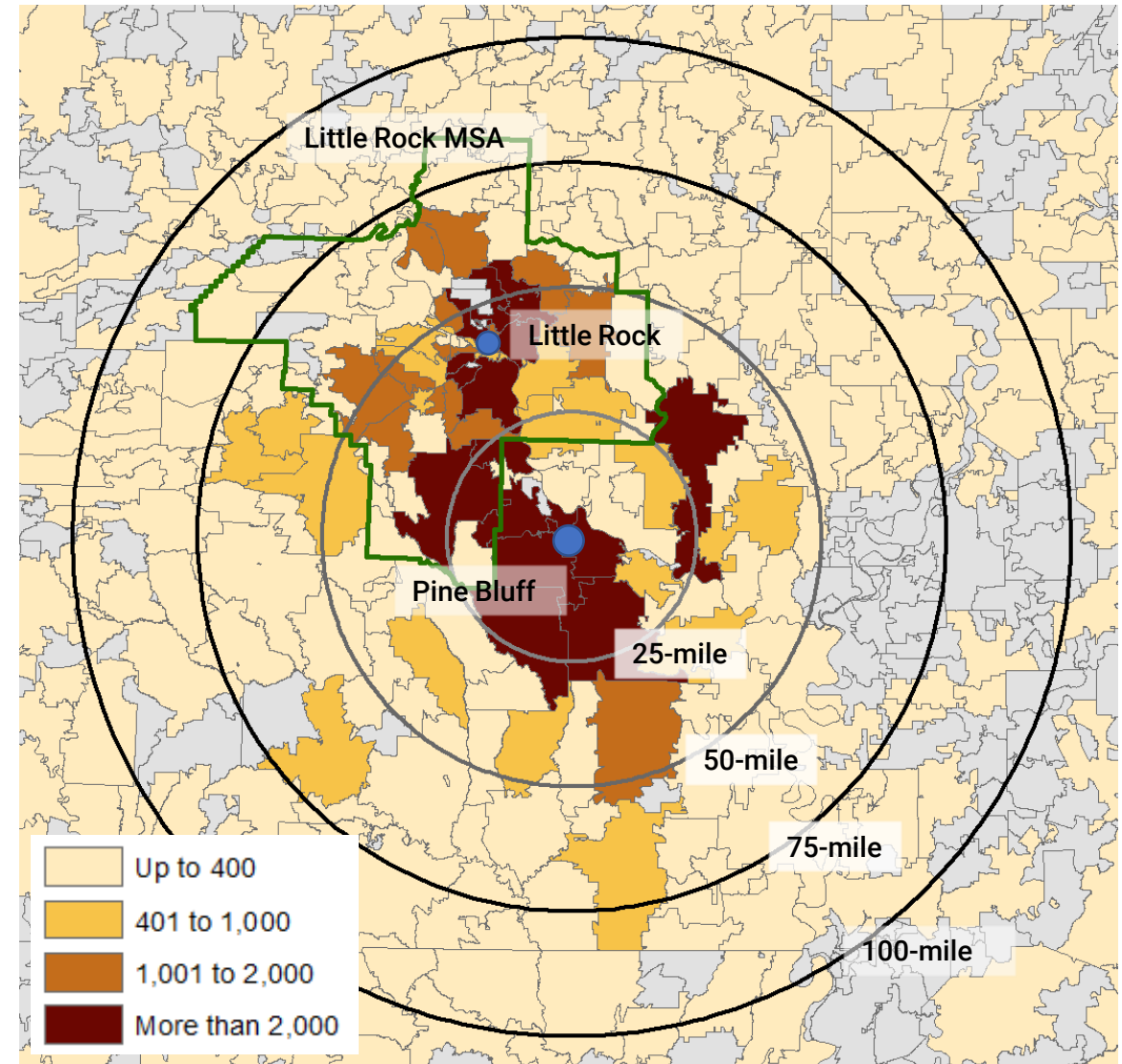
Saracen Casino

Visitation to Saracen Casino

Based on data provided by Pine Bluff, Saracen Casino welcomed approximately 2,000,000 visits in 2021. Based on geolocation mobile data provided by Near, approximately 50% of visits originated from 1 to 25 miles away from the casino, 33% originated from 25 to 50 miles away, and the remaining 12% of visits originated from greater than 50 miles away.

Overall, approximately 1,000,000 visits originated from more than 25 miles away from Saracen Casino.

Visitation to Saracen Casino, by Zip Code (2021)
(number of visits)



Source: Tourism Economics, Near

Saracen Casino

Potential Cross Visitation By Casino Patrons

Based on zip code demographic data on consumer spending and consumer preferences for recreation and leisure activities (as outlined in previous sections), Tourism Economics estimates that approximately 6% of the nearly 1,000,000 Saracen visits that originated from more than 25 miles away from the casino would find the proposed Pine Bluff cultural district an attractive destination, resulting in approximately 60,000 visits, as shown in the accompanying table. It is important to note that a portion of the 60,000 visits to the cultural site from Saracen casino are already included in the estimated 104,000 visits based on the comparable site analysis previously outlined.

Tourism Economics estimates that approximately 24,000 visits to the cultural district from Saracen Casino would represent net new visits (i.e., these 24,000 visits to the cultural district would not occur if patrons do not visit Saracen Casino).

Visitation to Saracen Casino & Potential Cross Visitation to Pine Bluff Cultural District

(number of visits)

Description	Percentage	Amount
Total visits to Saracen Casino	100%	2,000,000
Lives 1 to 25 miles away	50%	1,006,849
Lives 25 to 50 miles away	33%	655,619
Lives greater than 50 miles away	17%	337,532
Total visitors who live more than 25 miles away		993,151
Percentage of casino patrons that would find the Pine Bluff cultural district an attractive destination	6%	59,589
Net new visitation to Pine Bluff cultural district from Saracen Casino patrons		23,836

Source: Tourism Economics

Total Visitation

Including Cross-Visitation From Saracen Casino

After accounting for the nearly 24,000 net new visits from Saracen Casino, total visitation to the proposed cultural district amounts to nearly 128,000 visits, as shown in the accompanying table.

Pine Bluff Cultural District – Total Estimated Visitation (Including Cross Visitation from Saracen Casino)

(Number of visits)

Description	Visits
Total visits	127,940
Visits from 1 to 25 miles	40,028
Visits from 25 to 50 miles	64,808
Visits from over 50 miles	23,104

Source: Tourism Economics

Estimated Potential Annual Spending

Potential Annual Visitor Spending

The proposed Pine Bluff cultural district could welcome an estimated 128,000 visits (including net new visitation from Saracen Casino) on an annual basis. In addition to spending money during their visit to the cultural district, visitors would also spend money at other businesses and establishments in the regional economy during their stay in the area, including local restaurants, retailers, and recreation/entertainment venues.

Based on its research on the economic impacts of tourism in Arkansas and Jefferson County, Tourism Economics estimates that visitors to the proposed Pine Bluff cultural district would spend an average of \$155 during their stay in the region. The estimated average spending excludes spending on-site at Saracen Casino by visits to the cultural district that originate from Saracen Casino.

The impact analysis excludes spending by cultural district attendees who originate from less than 25 miles since they are considered local residents who would spend money in the regional economy even if they do not visit the proposed cultural district. As shown, the cultural district would welcome nearly 88,000 visits from more than 25 miles away from Pine Bluff each year.

Based on approximately 88,000 annual visits from 25 or more miles from the proposed cultural district, and an average spend of \$155 per visit, total potential visitor spending attributable to the cultural district could amount to more than \$13.6 million annually.

Source: Tourism Economics

Pine Bluff Cultural District - Estimated Potential Annual Visits and Potential Visitor Spending

(Amounts as indicated)

Description	Amount
Total visits	127,940
Visits from 1 to 25 miles	40,028
Visits from 25 to 50 miles	64,808
Visits from over 50 miles	23,104
Total visits to Pine Bluff cultural district from over 25 miles away	87,912
Average spending per visit	\$155
Total spending by visits from over 25 miles (\$ millions)	\$13.63

Estimated Spending

Potential Visitor Spending By Industry

Non-local patrons could spend a total of \$13.6 million at businesses and establishments during their stay in the region

The \$13.6 million in potential spending by visitors to the proposed cultural district would be spread across a number of industries. As shown in the accompanying figure, Tourism Economics estimates that visitors would spend \$3.8 million on food and beverage purchases, \$2.9 million on retail purchases, \$2.5 million on recreation and entertainment, \$2.5 million on transportation (including gasoline purchases), and \$2.1 million on lodging.



Source: Tourism Economics



7 Summary Economic Impacts

Economic Impact Approach

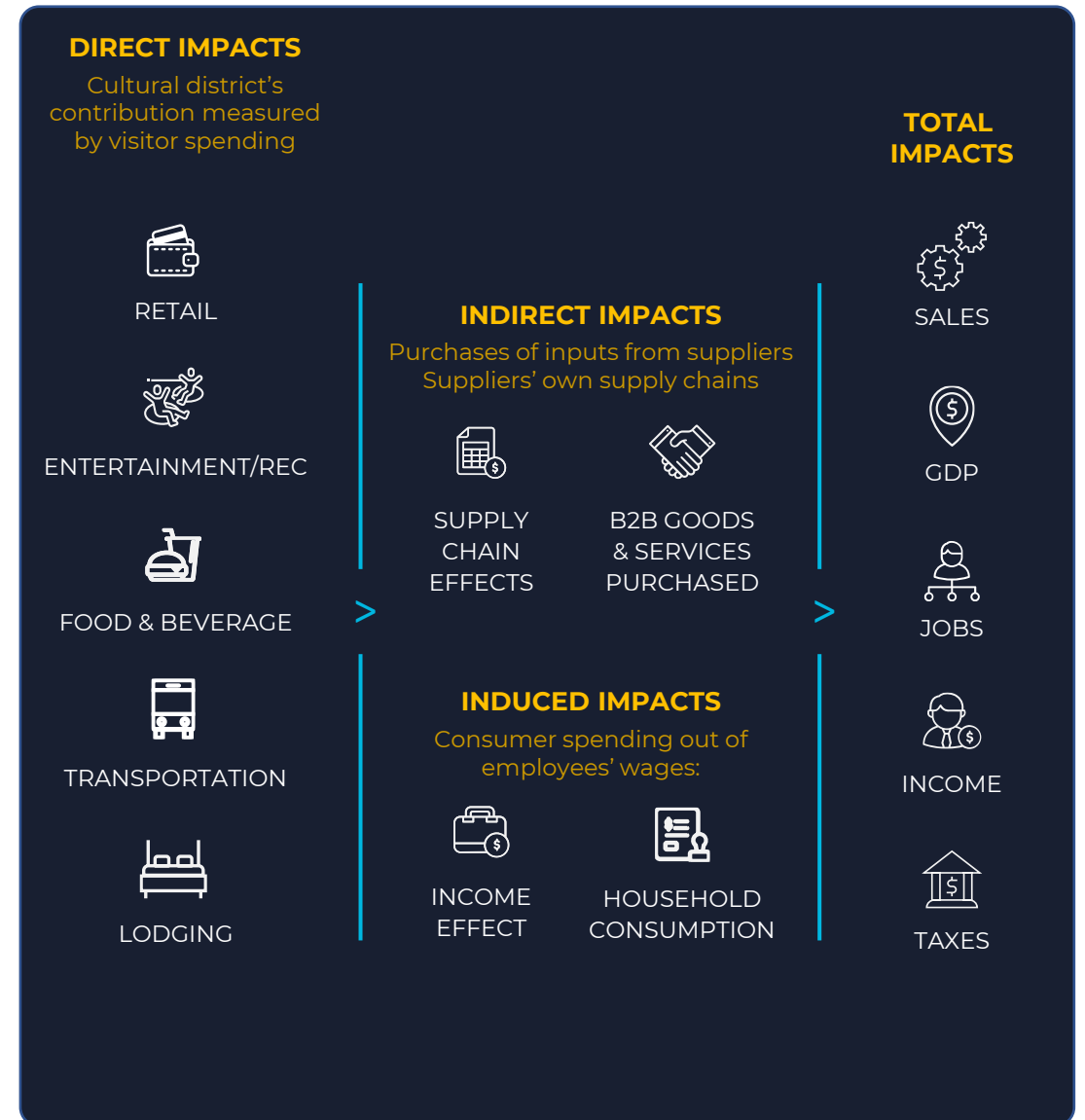
Introduction and definitions

Tourism Economics estimated the potential economic impacts of the cultural district's direct impacts (including annual spending by non-local visitors) using regional Input-Output (I-O) models based on customized IMPLAN (www.implan.com) models for the regional economy of Jefferson County. IMPLAN is recognized as an industry standard in local-level I-O models. An I-O model represents a profile of an economy by measuring the relationships among industries and consumers to track the flow of industry revenue to wages, profits, capital, taxes and suppliers. The supply chain is traced as dollars flow through the economy, representing indirect impacts. The model also calculates the induced impacts of spending. Induced impacts represent benefits to the economy as incomes earned as a result of direct spending are spent in the local economy, generating additional sales, jobs, taxes, and income.

The modeling process begins with aligning the direct expenditure measurements with the related sectors in the model (e.g. hotels, restaurants, retail, and recreation). The model is then run to trace the flow of these expenditures through the economy. In this process, the inter-relationships between consumers and industries generate each level of impact.

IMPLAN calculates three levels of impact – direct, indirect, and induced – for a broad set of indicators. These include the following:

- Business sales (also called gross output)
- Household income (including wages and benefits)
- Employment
- Federal taxes
- State and local taxes



Summary Economic Impacts

Spending by Non-Local Visitors

Potential spending by non-local cultural district visitors would generate a total economic impact of \$18.2 million on an annual basis

The potential \$13.6 million in spending by non-local visitors to the proposed cultural district would generate \$4.6 million in indirect and induced business sales, resulting in a total annual economic impact in Jefferson County of \$18.2 million. This total potential countywide economic impact would include \$5.2 million in total labor income, supporting nearly 250 total jobs each year.

The total annual economic impact of \$18.2 million would generate \$1.9 million in state and local taxes on an annual basis.

Summary Potential Annual Economic and Fiscal (Tax) Impacts Attributable to Spending by Non-local Cultural District Visitors

(Jefferson County, \$ millions and number of jobs)

	Economic Impacts
Total business sales	\$18.2
Direct operational expenditures & off-site spending by non-local patrons	\$13.6
Indirect & induced capital expenditures	\$4.6
Total labor income	\$5.2
Direct labor income	\$4.0
Indirect & induced labor income	\$1.2
Total employment impact	249
Direct jobs	214
Indirect & induced jobs	34
Total state and local taxes	\$1.9

Source: Tourism Economics

Note: Jobs are presented as annualized part-time and full-time jobs.



8 Potential Economic Impacts

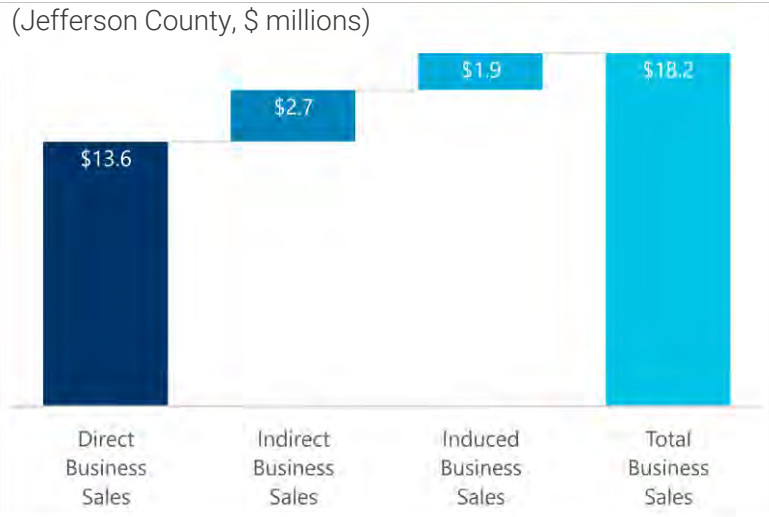
Potential Business Sales by Industry

Visitor Spending – Potential Business Sales Impacts

Potential spending by non-local visitors to the cultural district would generate a total annual economic impact of \$18.2 million in Jefferson County

The potential \$13.6 million in spending by non-local visitors would generate \$2.7 million in indirect business sales and \$1.9 million in induced business sales, resulting in a total annual economic impact of \$18.2 million in Jefferson County.

Summary Potential Economic Impacts Attributable to Visitor Spending



Potential Annual Business Sales Impacts by Industry

(Jefferson County, \$ millions)

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$13.6	\$2.7	\$1.9	\$18.2
By industry				
Food & Beverage	\$3.8	\$0.1	\$0.1	\$4.0
Retail Trade	\$2.9	\$0.1	\$0.2	\$3.1
Recreation and Entertainment	\$2.5	\$0.0	\$0.0	\$2.5
Lodging	\$2.1	\$0.0	\$0.0	\$2.1
Gasoline Stations	\$1.7	\$0.0	\$0.0	\$1.7
Finance, Insurance and Real Estate	\$0.0	\$0.8	\$0.6	\$1.4
Other Transport	\$0.8	\$0.1	\$0.0	\$0.9
Business Services	\$0.0	\$0.6	\$0.1	\$0.7
Education and Health Care	\$0.0	\$0.0	\$0.5	\$0.5
Construction and Utilities	\$0.0	\$0.3	\$0.1	\$0.3
Wholesale Trade	\$0.0	\$0.2	\$0.1	\$0.2
Personal Services	\$0.0	\$0.1	\$0.1	\$0.2
Communications	\$0.0	\$0.1	\$0.0	\$0.2
Government	\$0.0	\$0.1	\$0.0	\$0.1
Manufacturing	\$0.0	\$0.1	\$0.0	\$0.1
Agriculture, Fishing, Mining	\$0.0	\$0.0	\$0.0	\$0.0
Air Transport	\$0.0	\$0.0	\$0.0	\$0.0

Source: Tourism Economics

Note: Totals may not sum due to rounding

Potential Business Sales by Industry

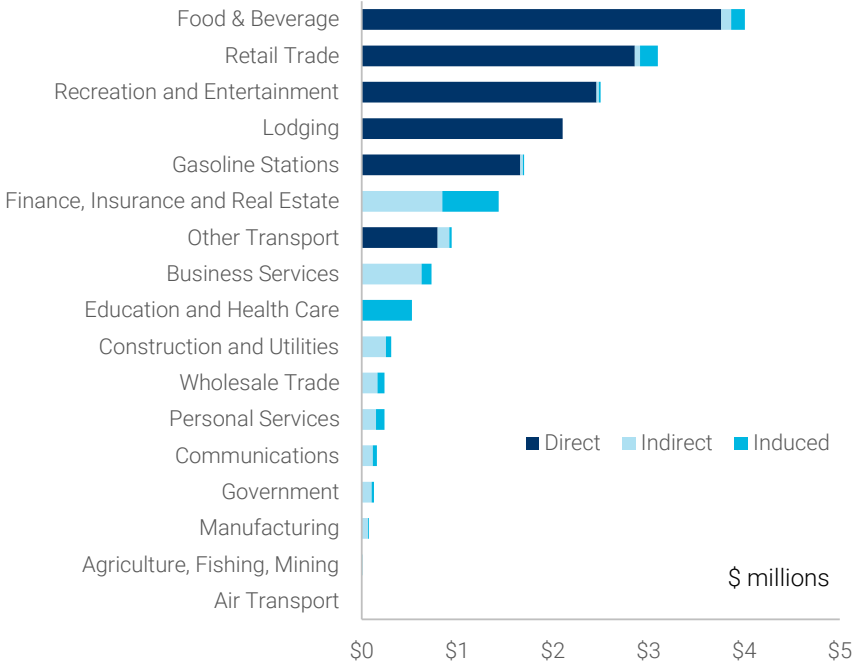
Visitor Spending – Potential Business Sales Impacts

Potential spending by non-local visitors to the cultural district would generate a total annual economic impact of \$18.2 million in Jefferson County

The food and beverage industry would be the most impacted industry with approximately \$4.0 million in total business sales in Jefferson County. Retail trade would rank second with \$3.1 million in total business sales.

Annual Business Sales Impacts by Industry

(Jefferson County, \$ millions)



Source: Tourism Economics

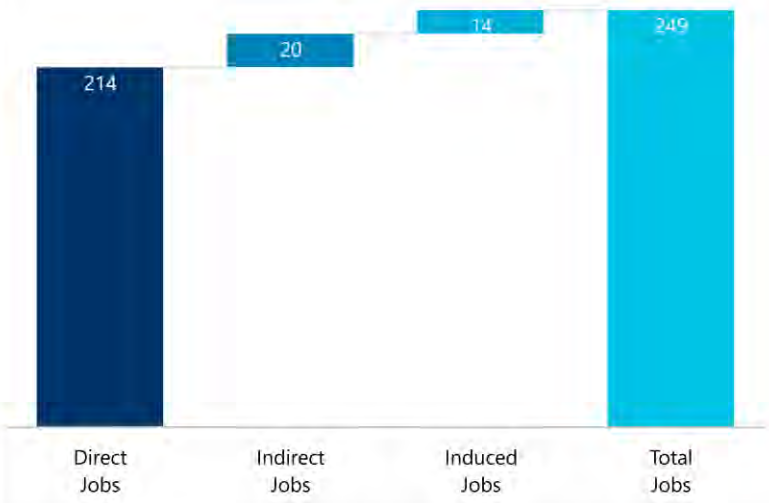
Potential Employment by Industry

Visitor Spending – Potential Employment Impacts

Potential spending by non-local visitors would generate a total employment impact nearly 250 jobs in Jefferson County

The total economic impact attributable to visitor spending would support nearly 250 part-time and full-time jobs on an annual basis in Jefferson County, including approximately 214 direct jobs, 20 indirect jobs, and 14 induced jobs.

Summary Employment Impacts Attributable to Visitor Spending
(Jefferson County, number of part-time and full-time jobs)



Annual Employment Impacts by Industry

(Jefferson County, number of part-time and full-time jobs)

	Direct Employment	Indirect Employment	Induced Employment	Total Employment
Total, all industries	214	20	14	249
By industry				
Food & Beverage	66	2	2	70
Recreation and Entertainment	36	1	0	37
Retail Trade	33	1	2	36
Lodging	30	0	0	30
Other Transport	25	1	0	27
Gasoline Stations	24	0	0	24
Business Services	0	8	1	9
Finance, Insurance and Real Estate	0	4	1	5
Education and Health Care	0	0	5	5
Personal Services	0	2	1	3
Government	0	1	0	1
Wholesale Trade	0	0	0	1
Construction and Utilities	0	0	0	0
Communications	0	0	0	0
Manufacturing	0	0	0	0
Agriculture, Fishing, Mining	0	0	0	0
Air Transport	0	0	0	0

Source: Tourism Economics

Note: Totals may not sum due to rounding.

Jobs include part-time and full-time jobs.

Potential Employment by Industry

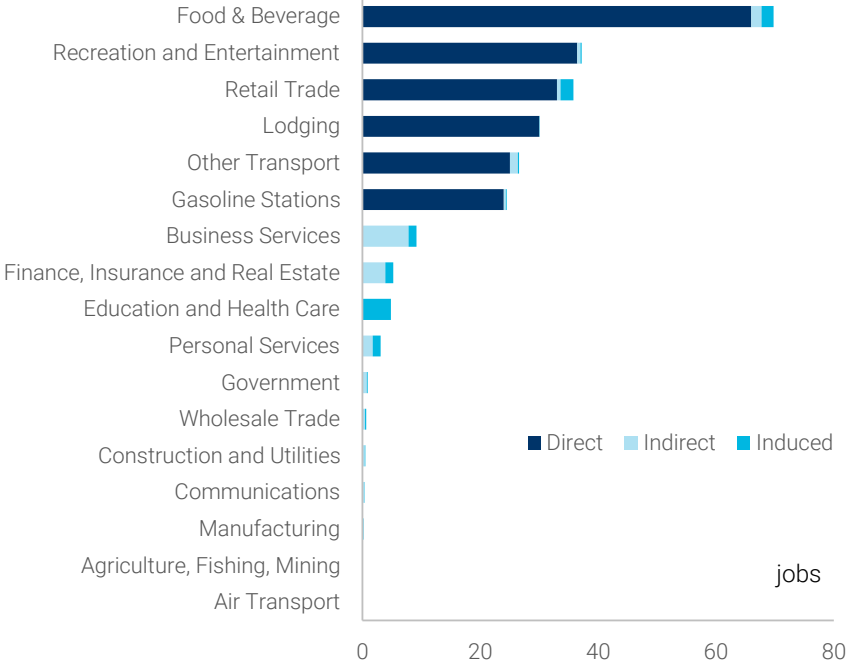
Visitor Spending– Potential Employment Impacts

Potential spending by non-local visitors would generate a total employment impact nearly 250 jobs in Jefferson County

The food and beverage industry would rank first with 70 total annualized jobs. The recreation & entertainment industry would rank second with 37 total jobs.

Annual Employment Impacts by Industry

(Jefferson County, number of part-time and full-time jobs)



Source: Tourism Economics

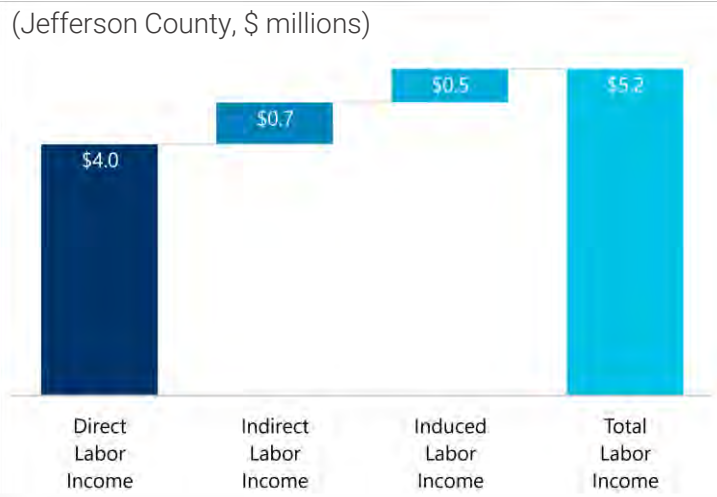
Potential Labor Income by Industry

Visitor Spending – Potential Labor Income Impacts

Potential spending by non-local visitors would generate a total annual labor income impact of \$5.2 million in Jefferson County

Spending by non-local visitors would support \$4.0 million in direct labor income, \$0.7 million in indirect labor income, and \$0.5 million in induced personal income, resulting in \$5.2 million in total labor income in Jefferson County on an annual basis.

Summary Labor Income Impacts Attributable to Amphitheater Operational Spending and Off-Site Patron Spending



Annual Labor Income Impacts by Industry

(Jefferson County, \$ millions)

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total, all industries	\$4.0	\$0.7	\$0.5	\$5.2
By industry				
Food & Beverage	\$1.1	\$0.0	\$0.0	\$1.2
Recreation and Entertainment	\$1.0	\$0.0	\$0.0	\$1.1
Gasoline Stations	\$0.8	\$0.0	\$0.0	\$0.8
Lodging	\$0.6	\$0.0	\$0.0	\$0.6
Retail Trade	\$0.4	\$0.0	\$0.1	\$0.4
Education and Health Care	\$0.0	\$0.0	\$0.3	\$0.3
Business Services	\$0.0	\$0.2	\$0.0	\$0.2
Other Transport	\$0.1	\$0.1	\$0.0	\$0.2
Finance, Insurance and Real Estate	\$0.0	\$0.1	\$0.0	\$0.2
Personal Services	\$0.0	\$0.1	\$0.0	\$0.1
Government	\$0.0	\$0.1	\$0.0	\$0.1
Construction and Utilities	\$0.0	\$0.0	\$0.0	\$0.0
Wholesale Trade	\$0.0	\$0.0	\$0.0	\$0.0
Communications	\$0.0	\$0.0	\$0.0	\$0.0
Manufacturing	\$0.0	\$0.0	\$0.0	\$0.0
Agriculture, Fishing, Mining	\$0.0	\$0.0	\$0.0	\$0.0
Air Transport	\$0.0	\$0.0	\$0.0	\$0.0

Source: Tourism Economics

Note: Totals may not sum due to rounding

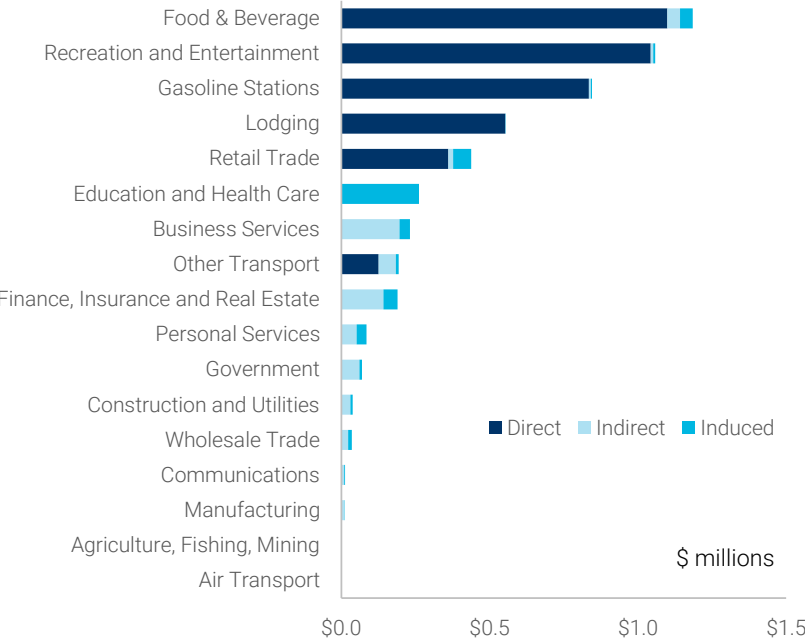
Potential Labor Income by Industry

Visitor Spending – Potential Labor Income Impacts

Potential spending by non-local visitors would generate a total annual labor income impact of \$5.2 million in Jefferson County

The food & beverage industry would be the most impacted industry in Jefferson County with approximately \$1.2 million in total labor income. The recreation & entertainment industry would follow with \$1.1 million in total labor income.

Annual Labor Income Impacts by Industry
(Jefferson County, \$ millions)



Source: Tourism Economics

9

Fiscal (Tax) Impacts

Tax Generation

Visitor Spending – Annual Tax Impacts

The total potential economic impact of \$18.2 million attributable to cultural district visitor spending would generate nearly \$1.9 million in annual state and local taxes

Spending by non-local visitors to the cultural district would generate a total fiscal (tax) impact of \$3.2 million on an annual basis.

Total federal taxes would amount to \$1.3 million annually.

Total state and local taxes would amount to \$1.9 million, including \$1.1 million in sales taxes, \$0.1 million in personal income taxes, \$0.1 million in excise taxes and fees, and \$0.6 million in property taxes.

Total advertising and promotion taxes in Pine Bluff would amount to approximately \$63,000 on an annual basis.

Annual Fiscal (Tax) Impacts Attributable to Visitor Spending

(Federal and state and local taxes, \$ millions)

	Direct Taxes	Indirect Taxes	Induced Taxes	Total Taxes
Total Taxes	\$2,050,000	\$653,000	\$441,000	\$3,145,000
Federal	\$581,000	\$400,000	\$282,000	\$1,263,000
Personal income	\$223,000	\$37,000	\$29,000	\$289,000
Corporate	\$30,000	\$11,000	\$11,000	\$53,000
Indirect business	\$10,000	\$10,000	\$10,000	\$30,000
Social insurance	\$318,000	\$89,000	\$71,000	\$477,000
State and Local	\$1,470,000	\$253,000	\$160,000	\$1,883,000
Sales	\$874,000	\$149,000	\$92,000	\$1,115,000
Advertising & Promotion	\$60,000	\$1,000	\$2,000	\$63,000
Personal income	\$79,000	\$13,000	\$10,000	\$102,000
Corporate	\$14,000	\$5,000	\$5,000	\$24,000
Excise and fees	\$74,000	\$13,000	\$8,000	\$95,000
Property	\$428,000	\$73,000	\$45,000	\$546,000

Source: Tourism Economics

About Tourism Economics

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of the travel sector with proven economic tools to answer the most important questions facing our clients. More than 500 companies, associations, and destination work with Tourism Economics every year as a research partner. We bring decades of experience to every engagement to help our clients make better marketing, investment, and policy decisions. Our team of highly-specialized economists deliver:

- Global travel data-sets with the broadest set of country, city, and state coverage available
- Travel forecasts that are directly linked to the economic and demographic outlook for origins and destinations
- Economic impact analysis that highlights the value of visitors, events, developments, and industry segments
- Policy analysis that informs critical funding, taxation, and travel facilitation decisions
- Market assessments that define market allocation and investment decisions

Tourism Economics operates out of regional headquarters in Philadelphia and Oxford, with offices in Belfast, Buenos Aires, Dubai, Frankfurt, and Ontario.

Oxford Economics is one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC, we employ over 250 full-time staff, including 150 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

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